UNITED STATES DEPARTMENT OF LABOR

Division of Older Worker Programs

SPARQ v2.0 System User's Guide
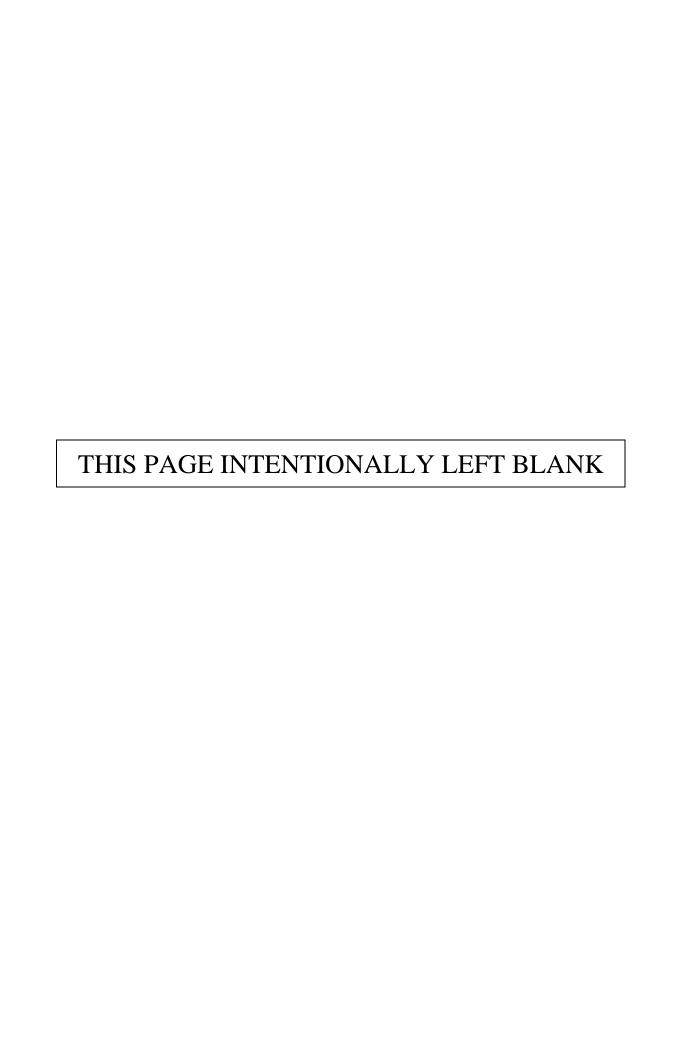
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I. INTRODUCTION

A. BACKGROUND

The Senior Community Service Employment Program (SCSEP) is a part-time employment training program for low-income individuals aged 55 and over. Overseen by the U.S. Department of Labor's Employment and Training Administration (ETA), Division of Adult Services (DAS), the SCSEP program is run by grantees and their sub-grantees. It is authorized under Title V of the Older Americans Act of 1965, as amended in 2000.

In order to improve their job skills, SCSEP participants are placed at community and government agencies for training and may also receive specialized training. Grantees and their sub-grantees are responsible for tracking the progress of their participants through the SCSEP and reporting that information to DAS. From the data that is submitted, DAS generates Quarterly Performance Reports (QPRs) at the sub-grantee, grantee and national levels to monitor program progress.

In 2004, DAS provided the SCSEP Data Collection Software (DCS) to grantees and sub-grantees because most had limited data collection and reporting capabilities. Developed by Mathematica Policy Research, Inc. (MPR), the DCS application allowed grantees to enter, store, and manage the SCSEP participant data required by DAS. Grantees submitted their data on a quarterly basis to DAS via SPARQ (**S**CSEP **P**erformance **A**nd **R**esults **Q**uarterly Progress Report), the national SCSEP database.

In 2005, DAS authorized the development of a web-based version of the DCS to be integrated with the existing SPARQ database. That enhanced version of SPARQ, version 2.0, was implemented in June, 2006. This handbook provides support to end-users of that system.

B. BASIC TERMINOLOGY

This User's Guide utilizes various terms to describe the SCSEP data collection and reporting systems and the grantees that use them. To ensure clarity when using this document, definitions for these terms are provided below:

- ➢ **DCS** – The SCSEP **D**ata **C**ollection **S**ystem is the desktop data entry application that most grantees initially used. It is the original software provided by DAS for grantees to collect program data.

- ➢ **Non-DCS Users** – Grantees that used their own automated system and previously submitted required SCSEP data to DAS using Excel spreadsheets.

- ➢ **SPARQ** – The generic term used to describe the overall automated SCSEP system (data entry application, upload process, national database, and reports). SPARQ is the acronym for "**S**CSEP **P**erformance **a**nd **R**esults **Q**PR."

- ➢ **SPARQ v1** – The original SCSEP environment in which all grantees previously submitted quarterly data using xml files.

- ➢ **SPARQ v2** – The version of SPARQ that contains the web-based data collection system.

- ➢ **SPARQ v2.0** – The first release of SPARQ v2 containing core SCSEP functionality.

- ➢ **SPARQ v2.X** – Subsequent releases of SPARQ v2, which will contain additional functionality.

- ➢ **WebDCS** – The web-based data entry application that replaces the original desktop Data Collection System. Also referred to as "WDCS," it is part of the SPARQ v2 application.

➤ **Non-WebDCS Users** – Grantees that continue to use their own automated systems after the release of SPARQ v2. These grantees submit their data to SPARQ utilizing a set of comma delimited files. Also referred to as Non-WDCS Users.

C. WebDCS NOTES FOR FORMER SCSEP DCS USERS

For the convenience of former SCSEP DCS users, this section provides an overview of the changes to the DCS application that have been implemented in the WebDCS portion of SPARQ v2.0.

WebDCS maintains the same general look and feel of the prior, non-web-based versions of the DCS application in order to make transition to the new system as easy as possible for former DCS users. The new system also incorporates all the data entry functionality contained in prior, non-web-based versions of the application. However, WebDCS has been enhanced in many ways to make it more robust and useful to SCSEP grantees/sub-grantees as a potential case management tool. These new features include:

➢ New Security/Access Model

All grantees will have **direct** access to their complete set of detailed SCSEP data, as well as **direct** access to management reports and an ad-hoc reporting tool. Grantees will be able to create and maintain user accounts for their staff.

For the first time, sub-grantees will have **direct** access to SPARQ for data entry and retrieval of QPR and Data Quality Reports (DQRs). Both the XML file creation and submission processes are no longer necessary.

Multiple authorized users can view records in WebDCS simultaneously. This feature will support program management efforts by facilitating discussions between grantee and sub-grantee, supervisor and caseworker, etc. when these individuals are not co-located.

➢ Enhanced Error Correction Capabilities

WebDCS contains several new features that will help the user with data errors. Additional on-line screen edits have been added

to the application and an enrollment-level Data Quality Problems (EDQP) feature is being introduced.   The EDQP will be generated on demand to provide the user with feedback on the quality of the data associated with a specific enrollment.   The **EDQP** function will subject the enrollment data to the full complement of QPR edits and any problems that are identified will be displayed on the screen.

** IMPORTANT **
The full sub-grantee level DQR will continue to be available on an overnight basis whenever a QPR is generated.

➢ Search Capabilities

All users of SPARQ – including Non-WDCS users – will be able to search the national SCSEP database for existing Participant and Organization records to assist in the prevention of duplicate records and overlapping enrollments.

➢ Re-Enrollment Information

SPARQ now contains a screen that provides the user with the ability to enter new re-enrollment information. Consequently, the former practice of writing over old data previously utilized in DCS is no longer needed.

➢ Facilitated Entry of Organization and Contact Person Data

WebDCS users will be able to conveniently input Organization and Organization Contact data from several different entry points in the WebDCS application.

➢ Re-Certification Information

A new screen is provided in WebDCS for the capture of this data, thus allowing the original enrollment information to be preserved.

➢ Batch Entry of CSA Paid Hours and Training Hours

In addition to allowing users to enter hours on an individual participant's record, WebDCS provides a batch mechanism to enter both kinds of data for all participants on one screen.

➢ New Case Management Fields

This new set of data includes such items as IEP/physical/orientation dates, job interest codes, approved leave of absence, etc.

➢ Training Information

While collecting data on training assignments is optional in the SPARQ v2, the functionality to do so is available to all users.

➢ Enhanced Data Quality Reports

Data Quality Reports (DQRs) will now provide participant last name and the last four digits of the participant's Social Security Number for more simplified record identification. In addition, data errors have been newly categorized to clarify the priority order in which they should be corrected (See Chapter IX, Section C for more details).

➢ Participant Changes between Grantees/Sub-grantees

For the first time, SCSEP grantees will be able to process participant changes between sub-grantees of the same grantee, as well as transfers across grantees. While this process is not fully automated, it will eliminate the need for the two SCSEP organizations involved to enter the same data.

➢ Additional Management Reports and Grid Views

Along with the six standard reports that were available in the prior version of DCS, SPARQ will have an additional nine

standard management reports (see Chapter IX, Section D for more details). Similarly, for ad hoc reporting, additional grid views will be available to better support the grantees/sub-grantees in their SCSEP program management efforts. (See Chapter IX, Section F for more details).

D. CONTACT INFORMATION FOR SPARQ USERS

After reviewing this handbook, SPARQ users should contact Mathematica Policy Research, Inc. (MPR) with any questions on using the new web-based system.

> ➢ **by e-mail:**   SCSEP@mathematica-mpr.com.

> ➢ **by phone:**

For SCSEP reporting issues: Bill Borden
                                                    609 275-2321

For software issues: Terry Cram
                                      609 750-3196

                                      Matt Potts
                                      609 936-3269

                                      Rose Pritchard
                                      609 945-3314

GUIDELINES FOR REQUESTING TECHNICAL ASSISTANCE

Because SPARQ v.2 is an internet-based system, the user may experience the typical problems related to any web application. The difficulty that a user encounters may originate from one or more possible sources:

  a) a malfunction of the computer network inside the user's office,
  b) an interruption in internet provider service,
  c) a problem in the Department of Labor's computer network,
  d) an overload on the SPARQ application (i.e., a very large number of users trying to access SPARQ at the same time), or
  e) a malfunction of the SPARQ v2 application itself.

For this reason, when the user encounters a problem working with SPARQ v2, the following course of action is recommend:

➢ **If the user is having trouble logging on to SPARQ v.2** (for example, you receive a "Page not found" message):
   1)   Wait a few minutes and try again.
   2)   If the problem still exists, check to see that your local network is functioning properly. You can do this by trying to access a public website such as yahoo.com or google.com. Alternatively, you can contact the IT administrator for your office.

➢ **If the user experiences a problem while using the SPARQ v2 application:**
   1) First, attempt to navigate away from the current page, then try again to perform work in SPARQ.
   2) If SPARQ still appears to be malfunctioning, close the SPARQ application and try logging in again.

If none of these actions remedies the problem, contact MPR for technical assistance. Include in your request a screenshot of any error message that you received.

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For assistance with SCSEP data element definitions or the process of collecting SCSEP data, users can refer to the *SCSEP Data Collection Handbook* available on The Charter Oak Group website (link = http://charteroakgroup.org). Alternatively, grantees and sub-grantee may contact The Charter Oak Group with questions at:
mailto:olderworker@charteroakgroup.org

II. USING SPARQ v2

A. WEBSITE NAVIGATION

1. *Browser Requirements:*

Recommended Browser: Microsoft Internet Explorer (IE) version 5.5 or higher

Minimum Browser Requirements:

Any browser that:

a)   Supports html
b)   Supports Javascript and has it enabled
c)   Supports SSL (Secure Socket Layer, a protocol for transmitting encrypted data)
d)   Has session cookies enabled
e)   Is compatible with CSS (Cascading Style Sheets, a method for formatting web pages used by SPARQ)

Contact your office IT Administrator to verify that your browser satisfies these requirements.
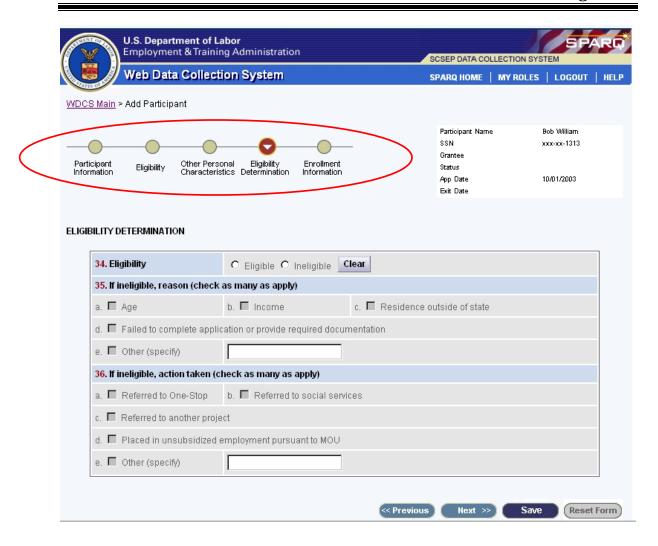

** IMPORTANT **

It is always best to use the navigation buttons *within* the SPARQ application. Using your browser's toolbar to move from screen to screen may inadvertently generate errors and possibly disconnect you from the system.

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2. *Website Navigation Map:*

An overview of the SPARQ v2.0 application is provided in Appendix A. In this website navigation map, functions are depicted in boxes in boldface type. Web page or screen names are indicated by italics and are prefaced by a tilda (~).

3. *Moving Among SPARQ Screens:*

Whenever the **Next** and **Previous** buttons appear at the bottom of a SPARQ screen, they can be used to navigate, respectively, to the succeeding or preceding screen in a sequence of screens. In addition, many SPARQ screens also display a *navigation bubble line* in the upper left portion of the screen:
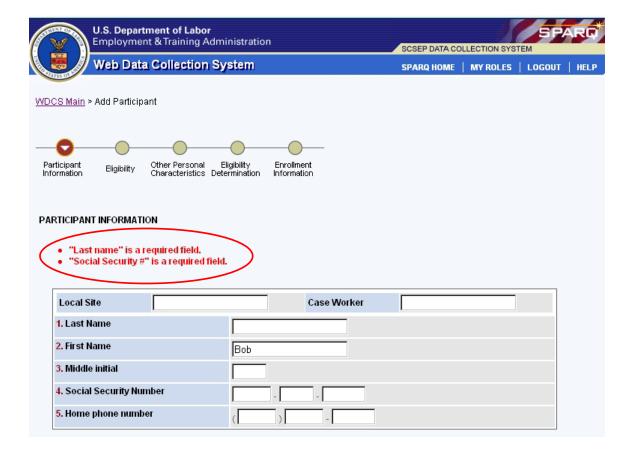
These navigation bubble lines serve two purposes. First, they identify which screen in a sequence of related screens the user is currently on, indicated by the ⊙ symbol. Second, they serve as a means to move users from one SPARQ screen to another. Users may navigate directly to any screen displayed on the bubble line by clicking on the appropriate bubble.

On SPARQ screens that contain system-required fields and edits, the user will not be allowed to move away from the screen by any means unless all mandatory data has been correctly entered. If required data are missing when the user attempts to navigate away from the current

screen, the screen will be re-displayed with the appropriate error message(s) at the top indicating what data are needed. That information must be entered before the user can navigate to another screen.

For example:

> **** IMPORTANT ****
>
> All system-required fields are identified in SPARQ with a dagger symbol.

4. *Saving Data to the SPARQ v2 Database:*

When entering data into SPARQ, it is important to note that ***data is <u>only</u> saved to the database when the user clicks on a SAVE button***. If the user moves from one screen in the application to another without clicking on an available **SAVE** button, none of the entered or edited data will be used to update the database. Instead, the data are held in a temporary area until a **SAVE** button is selected. Only then will SPARQ load into the database all the data that had been entered/edited since the last **SAVE** button was clicked. Whenever data are successfully saved to the database, the following confirmation message will be displayed in red in the upper left of the screen:

"The changes have been successfully saved!"

> **** IMPORTANT ****
>
> If the user leaves the application without clicking on <u>any</u> SAVE button, all data that was entered/edited in that session will be lost.

5. *Reset Form Button:*

If information is incorrectly entered into a screen, the data may be cleared at any time by clicking on the **RESET FORM** button

located at the bottom of the screen. Then, if desired, the correct data can be entered and saved. However, once the user navigates away from the current screen, data can be changed (edited), but no longer cleared.

B. BASIC DATA ENTRY RULES

1. *Standard Field Formats:*

➢ **Date Fields**

All date fields are displayed in SPARQ in MM/DD/YYYY format. While dates must always be entered with a 4-position year, the user may enter both the month and day with only a single digit when appropriate. Date fields in SPARQ can be populated in one of two ways – by directly entering a value into the available space or by using the calendar function that is adjacent to the field.

To use the *calendar function*, the user should click on the calendar icon ▦ located next to the field in which the date is to be entered. A calendar will open showing the current month and year with the current day highlighted:

To select a different year, use the << or >> icons at the top of the calendar. To select a different month, use the < and > icons.

When the correct month and year are displayed, simply click on the desired day, then click **[close].** Alternatively, the user may double-click

on the day desired. The specific date chosen will now appear in the space provided for that data field.

The user may also use the calendar function to remove a value previously entered into the date field. Clicking *[clear]* when the calendar is open will return the user to a blank data entry field.

➢ **Monetary Fields**

All monetary fields are stored in SPARQ in 99999.99 format. If a monetary amount is entered as 99999, it will be displayed as $99,999.00. Similarly, if it is entered as 99999.9, it will be displayed as $99,999.90.

2. *Standards for Data Selection:*

SPARQ utilizes the following standards for data fields that have a limited set of values from which to choose:

➢ If the choices for a data field are presented with *radio buttons*, then *one and only one value* can be selected.

Example: ○ Yes ○ No   **Clear**

** IMPORTANT **
A **CLEAR** button *{insert icon}* is associated with all radio button data fields. It can be used to remove any selection that has been made, thus leaving all possible choices for that field unselected.

➢ If the choices for a data field are presented with **check boxes,** then **one or more values** can be selected.

Example: ☑ i. Family/health ☑ ii. Personal ☐ iii. Administrative

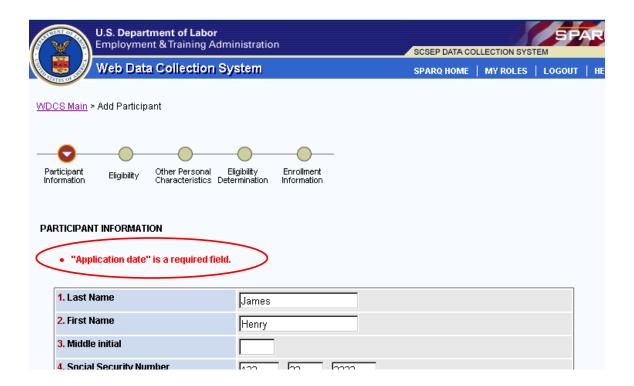➢ If the choices for a data field are presented with a **dropdown,** then **one and only one value** can be selected.

Example: | Select One ▼ |

➢ If one of the options for a data field is **Other-Specify** and it is selected, then the user should populate the accompanying text field.

Example: ☐ iv. Other (specify) [   ]

C. SPARQ v2 EDITS

WebDCS includes many more screen edits than the previous version of the Data Collection System. Also known as online edits, their purpose is to assist the user in preventing serious errors at the time the data is being entered. For this reason, screen edits are applied whenever the user attempts to leave the current screen. If errors are detected, appropriate message(s) identifying the problem will be displayed in red at the top of the screen. The data in error must be corrected before the user will be allowed to proceed.

There are two types of screen edit error situations. Either the error will pertain to one or more data fields on the current screen or it will pertain to data located on two different screens in WDCS. Each of these situations requires different handling. In the first case, when all data involved in the error are located on the current screen, the user simply makes the necessary data change(s) and can then proceed to another SPARQ screen. The following is an example of this type of one-screen error:

When the error is a two-screen error, what the user does depends on the location of the incorrect data:

1) If the incorrect data field is located on the current screen, the user simply corrects the data and can then proceed to another screen.

2) If the incorrect data field is located on a screen other than the current screen, the user must:
   a) Remove the conflicting data that generated the error on the current screen,
   b) Navigate to the second screen to change the incorrect data there, then
   c) Return to the first screen where the error message was originally displayed to re-input the necessary data.

For example, if the user selects "Eligible" in the Eligibility field (#34) on the **Eligibility Determination Screen** then clicks on **SAVE,** the following error message may appear:

In this case, the user needs to enter a value for "Number in family" (field #11) on the **Eligibility Screen.** To be able to leave the **Eligibility Determination Screen**, the user must first clear the Eligibility field. Once that is done, the user navigates to the **Eligibility Screen** to input "Number in family". Then the user returns to the **Eligibility Information Screen** to re-enter "Eligible" in the Eligibility field (#34).
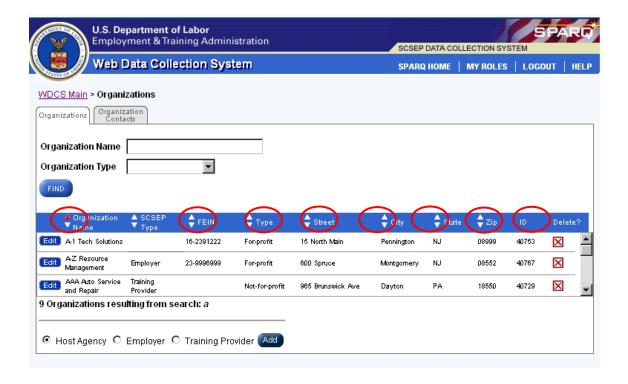
D. SCROLLING AND SORTING RECORD LISTS

When certain functions are performed in SPARQ, a list of records is returned to the user. These record lists are *scrollable* as well as *sortable*. For example, when an ***Organization Search*** is performed, the list of records that match the search criteria are displayed in table format:

A scroll bar will automatically appear to the right of the table if it contains more records than can be shown in the space available in the display window. Use the up (∧) and down (∨) arrows, or click and drag the scroll bar, to view additional information that is not currently visible on the screen.

Sorting functionality is also available in record lists. Every field displayed in the record list can be sorted in ascending or descending order using, respectively, the up (∧) and down (∨) arrows that appear next to the Field Name in the header row of the record list:

E. PRINTING FROM SPARQ

Some screens in SPARQ display a **PRINT** button.   `Print`
Selecting the **PRINT** button allows the user to produce a printer-friendly copy of the information that is displayed on the screen.

Note that the **PRINT SCREEN** (or **PRT SCRN**) button on the user's keyboard can be used at any time to produce a copy of the screen that is currently displayed.   Usually located in the upper right portion of the keyboard, this button will capture an image of the screen that can be pasted (saved) into virtually any document, including an e-mail note.

E. EXPORTING DATA

A limited number of screens in SPARQ display an **EXPORT EXCEL** button. EXPORT EXCEL

In these cases, the data that is displayed can be exported to a local PC and saved in Excel format. EXPORT buttons are found on the **Management Report Screens.**

Note: The **EXPORT EXCEL** buttons are not yet functional in SPARQ v2.0.

III. GETTING STARTED

A. TYPES OF SPARQ v2 USERS

1. *WebData Collection System (WDCS) vs. Non-WDCS Users:*

As described in the previous chapter, there are basically two types of SPARQ v2 users: those who use the WebDCS in SPARQ for data collection and those who do not. The latter group of users, or Non-WDCS users, will only have access to the high-level functions in SPARQ v2. In contrast, the WDCS users will have full access to all parts of the system.

Specifically, the functions in SPARQ that are available to all users, both WDCS and Non-WDCS, are:

➢ **QPRs:** Grantee QPR, Sub-grantee QPRs, State QPRs (if appropriate), Submission Review

➢ **Reports:** Management Reports (Ad-Hoc Reporting will be available in SPARQ 2.X)

➢ **System Tools:** Participant Search, Organization Search and Organization Contact Search and My User Info

These functions are displayed on the left side of the **SPARQ Home Page** once a user logs in to the system:

More detailed information about these "universal" SPARQ functions can be found in Chapter 5).

2. *User Roles:*

In SPARQ v2, the majority of WebDCS users will only have one role. However, there are some users who will have multiple roles. For example, if Grantee A has sub-contracted out the administration of its SCSEP program to Grantee B, the latter will have permission to access both grantees' data.

When accessing Grantee A's data, the user will use his role as Grantee A, but when accessing Grantee's B data, he will have to switch to his Grantee B role. The **My Roles Screen** in SPARQ v2 allows users with multiple roles to select which role to play at any given time. This function eliminates the need for logging in and out of SPARQ using multiple User IDs and passwords.

A sample **My Roles Screen** is shown here for reference. See Chapter 5, Section C for more a detailed description of this function.

B. CREATING AND MAINTAINING USER ACCOUNTS

SPARQ users who have been designated as Grantee or Sub-grantee Administrators have the ability to create and update user accounts for the grantee/sub-grantee data they are associated with.

** IMPORTANT **

Grantees may choose to de-centralize user account creation and maintenance authority by designating sub-grantee administrators. However, for tighter security, grantees may opt to restrict this functionality to staff in the grantee office.

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1. *Creating a New User Account:*

To establish a new user account, the Administrator first clicks on the **SPARQ User Account** link in the System Tools section located on the left side of the **SPARQ Home Page**.

A screen containing a list of the existing user accounts will be displayed:

Click on the **ADD NEW USER** button located just below the user list to access the **User Account Details Screen**:

Enter all required fields and, if desired, the new user's phone number. Clicking on **SAVE** will send an automatic e-mail notification from SPARQ-Support@dol.gov to the user whose SPARQ account was just created.

2. *Assigning User Roles and Permissions:*

When a new user account is being created, the **SPARQ User Role Assignment Screen** will automatically open after **SAVE** is selected on the **SPARQ New User Screen:**

Select a Role Type from the possible choices in the Step 1 dropdown.

The following table provides a list of the possible user roles in SPARQ:

USER ROLE	DESCRIPTION
Grantee	Person designated to access all data associated with a specified grantee
Grantee Administrator	Person designated to access all data associated with a specified grantee and to create/maintain user accounts for that grantee
Sub-grantee	Person designated to access all data associated with a specified sub-grantee
Sub-grantee Administrator	Person designated to view data associated with a specified sub-grantee and to create/ maintain user accounts for that sub-grantee
Database	Person designated to access data for a specified database. A database may be created at several different levels – as a subset of sub-grantee data or as a grouping of multiple sub-grantees' data
Submitter	Person designated to submit comma-delimited files for a Non-WDCS grantee

B. Creating and Maintaining User Accounts

Next, the Administrator must select the specific grantee, sub-grantee or database for the user. The Grantees, Sub-grantees or Databases that the Administrator has authority for are listed in the Step 2 dropdown.

In Step 3, the Administrator selects the Permission level for the user:

There are three permission levels available in SPARQ:

PERMISSION	DESCRIPTION
R	Read only – User may only view existing records
RW	Read/Write – User may view and add/edit records
RWD	Read/Write/Delete – User may view, add/edit and delete records

At this point, a confirmation box appears that summarizes the role information that has just been entered. If the information is correct, the Administrator clicks on **SAVE** to update SPARQ and is then returned to **User Account Details Screen**.

If the information is not correct, the Administrator has two options. The Administrator may make the necessary correction(s) in Steps 1, 2 and/or 3 as needed, then click **SAVE**. Or, alternatively, by clicking **CANCEL**, all information entered on the **Add a Role Assignment Screen** is discarded and the Administrator is returned to the **User Account Details Screen**.

This same process can be used to add a new role to a previously established SPARQ User. The Administrator starts by first selecting the appropriate user from the list displayed on the **User Accounts Screen.** .

3. *Deleting User Roles:*

To delete a user role, the Administrator first selects the user from the list displayed on the **User Accounts Screen**. When the **User Account Details Screen** appears, the Administrator selects the specific role to be deleted and clicks on **DELETE**. This step is repeated for additional roles to be deleted as needed.

To de-activate a SPARQ user so that he no longer has access to any data in SPARQ, the Administrator must delete all roles that the user had previously been assigned.

** IMPORTANT **
User Accounts **cannot** be deleted (completely removed) from SPARQ. They can only be de-activated by deleting all associated roles.

4. <u>Resetting Passwords:</u>

If a user has forgotten his/her password, the Administrator can reset it to the default value of "sparq123" as follows:

Select the user from the list displayed on the **User Accounts Screen:**

When the **User Account Details Screen** appears, the Administrator simply clicks on the **RESET USER PASSWORD** button located in the middle of the screen.

The following e-mail notification will automatically be sent to the user from SPARQ-Support@dol.gov.

> *"The password corresponding to your SPARQ user ID (WXYZ) has been reset to sparq123. You will be asked to change your password when you first log in."*

When the user next logs in to SPARQ using the default password, he/she will prompted to change the password to one of his own choosing. (See next section for logging on to SPARQ.)

C. LOGGING IN

1. *Grantee Log In Process:*

SCSEP grantees will continue to log in to SPARQ via the Grantee Reporting System as follows:

Use the URL: http://www.etareports.doleta.gov/ to access the Department of Labor Employment and Training Administration's *Grantee Reporting System:*

Click OK to display the Grantee Reporting System login screen:

Enter the password that has been issued to the grantee and click **LOGIN.**

**** IMPORTANT ****
1) Passwords are case-sensitive
2) Passwords are assigned by the Department of Labor's Information Technology department (PROTECH).
3) For forgotten passwords, contact PROTECH:
Omar Karim Karim.Omar@dol.gov 202-693-3925
Note that PROTECH will only release password information to those individuals on their list of authorized users.

The *Older Workers Grantee Reporting* options page will appear:

Click on the **SPARQ** button to display the **SPARQ Home Page**:

Listed on the left side of the screen are the functions the user has permission to access. This list will vary according to user.

2. *Sub-grantee Log In Process:*

Sub-grantees will log directly in to SPARQ as follows:

Use the URL: https://www.sparq2.doleta.gov/index.cfm to access SPARQ*

Click on **LOGIN** in the upper right to display the **SPARQ Log In Screen**:

* Please check the MPR's SCSEP website (http://scsep.mathematica-mpr.com/) for the latest login information.

Enter the User ID that has been assigned.

- **On initial login**, enter the default system password – "sparq123".

- **On subsequent logins**, enter the user-chosen password that was previously established.

- Click on **LOGIN.**

After entering the correct User ID and password for the first time, the SPARQ v2 user will be prompted to change the default password to a user-chosen one.

In the "Current Password" field, enter the default password ("sparq123").

Then enter a new password in the "New Password" field, and again in the "Confirm New Password" field.

Click on the **SUBMIT** button.

** IMPORTANT **
1) Passwords are case-sensitive.
2) User-selected passwords must contain at least one alpha character, at least one numeric character **and** at least one special character (for example, !, *, +)
3) If a user has forgotten his password, he should contact the grantee or sub-grantee administrator who assigned the initial User ID. The administrator will reset the password to the default value of "sparq123" and notify the user when it has been done.

Once the user password has been successfully changed, the **SPARQ Home Page** will be displayed with the SPARQ functions that the user has permission to access listed on the left:

The specific functions displayed will vary depending on the role(s) assigned to the user. This home page shows the functions available to a typical grantee level user.

To launch the WebDCS application, click on either the **WDCS** found in the upper right or the Launch WDCS link in the center of the screen.

3. *Multiple User Roles and Permissions:*

If a user has only one role, the *WDCS Main Screen* will appear when WDCS is launched:

If the user has been assigned more than one role, the **My Roles Screen** will be displayed instead:

When the user selects the appropriate role for the current session from those that are available and clicks on **CONTINUE**, the **WDCS Main Screen** will appear:

IV. OVERVIEW OF SPARQ SCREENS

A. SPARQ Home Page

Several universal functions are accessible to SPARQ v2 users from the **SPARQ Home Page**. They include:

> **Submissions***
> 1. Submit a File
> 2. Submission History

> **QPRs:**
> 1. Grantee QPR
> 2. Sub-grantee QPRs
> 3. State QPRs
> 4. Submission Review

> **Reports:**
> 1. Management Reports
> 2. Ad-Hoc Reporting (available in SPARQ v2.1)

> **System Tools:**
> 1. Participant Search
> 2. Organization Search
> 3. SPARQ User Accounts**
> 4. My User Info

*   Available only to Non-WDCS Users
** Available only to Grantee and Sub-grantee Administrators

A brief description of each function is provided below:

SUBMIT A FILE – This function allows SPARQ Users to submit their data to DAS for quarterly performance reporting. In SPARQ v1, this function

was previously available to all grantees, both DCS and Non-DCS. Starting with the implementation of SPARQ v2.X, however, only Non-WDCS will have access to this function for submitting their data (WDCS Users will be entering their data directly into SPARQ). Non-WDCS submissions will be required in comma-delimited (.csv) format on a monthly basis.

SUBMISSION HISTORY – This function provides each Non-WDCS grantee with a list of files that have been previously submitted to SPARQ for the grantee. For a grantee who has contracted out some of its grant, the Submission History will include the files that the contractor submitted on behalf of the grantee as well as the files that the grantee has submitted for itself.

For Non-WDCS Users, the list will include both the xml files submitted to SPARQ v1 as well as the .csv files that are submitted after the release of SPARQ v2.0.

GRANTEE QPR **–** This function allows the user to view grantee-level Quarterly Performance Reports produced by SPARQ. The final version of each report for the last two years is available online. (Older reports are archived.) Grantees will be able to view the National QPR as well as the QPRs of all other grantees.

SUB-GRANTEE QPRs **–** This function allows the user to view sub-grantee level Quarterly Performance Reports produced by SPARQ. The final version of each report for the last two years is available on-line. In addition, the last Data Quality Report that was produced will also be available. Both grantees and sub-grantees will be able to directly view the sub-grantee level QPRs. (This function was previously available to grantees in SPARQ v1.)

STATE QPRS – This function is only available to National SCSEP grantees. It allows users to view state-level Quarterly Performance Reports that have been produced for the grantee by SPARQ. The final version of each report for the last two years is available on-line. (This function was previously available to national grantees in SPARQ v1.)

SUBMISSION REVIEW – This function is similar to the Submission History (see above) except that the list of files that is displayed for the grantee is limited to those that the grantee has submitted on his own behalf. (This function was previously available in SPARQ v1.)

MANAGEMENT REPORTS – This function allows users to view and print standard management reports produced by SPARQ. A total of sixteen reports are planned, with reports being released in SPARQ v2 as they become available. For more information on management reports, see Chapter IX, Section D. (This function was previously available to DCS users but only included six reports.)

AD HOC REPORTING – Available starting in SPARQ v2.X, this function will allow the user to analyze SCSEP data and create customized reports. Several different *grid views* will be provided as starting points for analysis and custom reporting. A similar function, the Data Analysis Grid Views, was previously available to users of DCS. For more information on ad hoc reporting in SPARQ v2, see Chapter IX, Section E.

PARTICIPANT SEARCH – This new function allows users to search for SCSEP participants by Last Name or Social Security Number. Users have the option of searching only their data or the entire SCSEP database (program-wide).

** IMPORTANT **

It is strongly recommended that Non-WDCS users utilize this function to identify whether an applicant/participant exists in the SPARQ database, thereby preventing duplicate SSN errors at the time of submission. For similar reasons, it is recommended that WDCS users also use this function before attempting to add an applicant/participant to the SPARQ database.

ORGANIZATION SEARCH – This new function allows users to search for host agencies, employers and training providers by organization name or

SCSEP Type. It is similar to the **Participant Search** function in that users have the option of searching only their data or the entire SCSEP database. This function can assist in the prevention of duplicate organization records in SPARQ.

B. WDCS Main Screen

When a SPARQ user launches the WebDCS, the system opens to the **WDCS Main Screen**, which has links to both Administrative and Participant functions.

1. *Administrative Functions:*

Two Administrative Functions – *Organizations* and *CSA Hours* – can be accessed from buttons at the top of the WDCS Main Screen:

The *Organizations* function allows users to add and edit both SCSEP organizations and organization contacts. The *CSA Hours* function allows for adding/editing Total Paid Hours and Total Training Hours for multiple participants on a single screen. See Chapter VI, Section C for more detailed information on how to use these functions.

2. *Participant Functions:*

Participant functions are also available to the user from the **WDCS Main Screen**. Located below the administrative function buttons, two participant functions are immediately accessible to the user when the

WDCS Main Screen first opens – *Participant Search* (1) and *Add Participant* (2):

1

2

New participant records may be added to the SPARQ database via the *Add Participant* function. An existing Participant record can be located by utilizing the *Participant Search* function. The participant search may be done by participant last name or SSN. See Chapter VII for more detailed information on how to use these functions.

Once the user locates and selects a specific participant record through the search function, six additional participant functions become available on the **WDCS Main Screen**:

1) Edit Participant
2) Edit Enrollments
3) View Participant Profile
4) Add Enrollments
5) Assignments/Exits
6) Placements

Each of these functions is briefly described below:

EDIT PARTICIPANT **--** Allows the user to update basic information about the selected Participant that was previously entered – Last Name, First Name, Middle Initial and SSN.

EDIT ENROLLMENT -- Allows the user to change existing data on the enrollment record selected or to add additional information to it.

VIEW PARTICIPANT PROFILE **--** Allows the user to view a summary of all records that have been entered into SPARQ for the chosen participant.

ASSIGNMENTS/EXITS -- Allows the user to add assignment and exit information. When first clicked, the **ASSIGNMENTS/EXITS** button will display a list of existing assignment records (if any) that are associated with the selected enrollment:

At this point, the user may choose to add a new assignment to the SPARQ database by clicking on the **ADD ASSIGNMENTS AND EXITS** button

(1). Or, the user may select one of the existing assignments to update the associated data already captured in SPARQ and/or to add additional information to the assignment record (2).

PLACEMENTS -- Similar to the *Assignments/Exits* function. When the **PLACEMENTS** button is first clicked, it will display a list of the existing placement records in SPARQ (if any) that are associated with the selected enrollment:

Once the user chooses a specific placement, he/she can update the existing placement data or add additional information to the placement record (1). To add a new placement record to the enrollment that has been selected, the user clicks on the **ADD PLACEMENT** button to begin that process (2).

See Chapter VII for more detailed instructions on how to use these functions.

3. *Common SPARQ Functions:*

There are several common functions that can be accessed from the **WDCS Main Screen** as well as all other pages in SPARQ. Both the **SPARQ HOME Page** and the **My Roles Screen** can be directly accessed by using the links available in the upper right. In addition, at any time, the user may log out of SPARQ by using the **LOGOUT** link.

Note that the **HELP** function is not functional in SPARQ v2.0.

V. UNIVERSAL SPARQ FUNCTIONS

Several high-level functions are universally available to all users of SPARQ v2. Grouped into four categories, they are accessible from the **SPARQ Home Page**. A description of each function is provided below:

A. SUBMISSIONS

This category of functions is only available to Non-WDCS Users.

1. *Submit a File:*

In SPARQ v1, the ***Submit a File*** function was used by all grantees to transmit their SCSEP data to DAS via xml files. In SPARQ v2, however, most grantees no longer need to use this function since they are WDCS Users who enter their SCSEP data directly into the system. Only the Non-WDCS users will be required to access this function to submit their program data to SPARQ v2 using a set of four comma-delimited (.csv) files. Although not functional in SPARQ v2.0, the ***Submit a File*** function will be made available to Non-WDCS Users in time for them to complete their PY2005 submissions.

2. *Submission History:*

To obtain a full listing of the files that have been submitted on behalf of a grantee, click on ***Submit a File*** link on the left side on the **SPARQ Home Page**. Note that there can be more than one submitter sending files to SPARQ for a given grantee. This occurs, for example, when a grantee contracts out some or all of its grant to other SCSEP grantees.
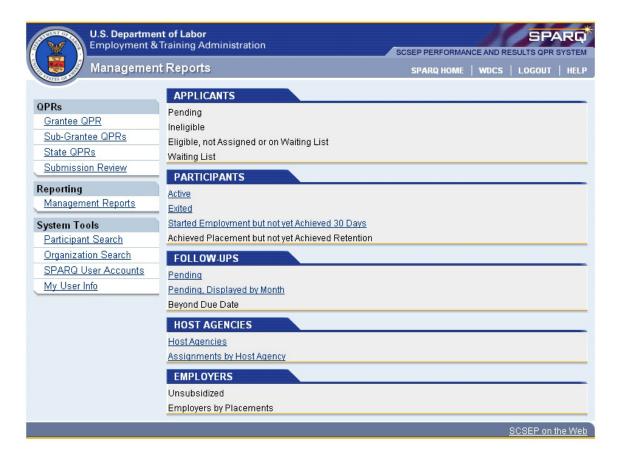
The following is a sample Submission History report:

Note that these reports can be displayed for a specific program year and quarter at either at the grantee or the sub-grantee level.

B. QPRs

1. QPRs

The *QPRs* function will not be fully operational until SPARQ v2.X. For this reason, only a high-level description is included here. Additional information about these reports can also be found in Chapter IX.

Beginning with SPARQ v2.X, grantees will be able to access a new version of their grantee-level QPRs that incorporates some new edits. To view these reports, the user first clicks on the Grantee QPR link on the left side of the **SPARQ Home Page,** then chooses the appropriate Program Year and Quarter for the specific report to be viewed.

In addition to grantee level reports, SPARQ v2.X will also produce sub-grantee level QPRs that can be accessed by the grantee. Unlike in SPARQ v1, however, the sub-grantee who owns the data will also have the authority to directly access sub-grantee QPRs. To view these reports, the user selects the Sub-grantee QPR link on the left side of the **SPARQ Home Page,** then chooses the appropriate Program Year and Quarter for the specific report to be viewed.

For national grantees, state-level QPRs will also be available in SPARQ v2.X. These reports summarize the national grantee's performance by state for each state in which it operates. To view one of these QPRs, the user first clicks on the Sub-grantee QPR link on the left side of the **SPARQ Home Page.** The user then designates the specific state of interest and chooses the appropriate Program Year and Quarter for the report to be viewed.

All QPR reports can be printed directly from SPARQ or saved as an html file.

2. *Submission Review:*

This function allows the user to display a list of all files that the grantee has submitted to SPARQ. It is similar to the **Submission History** function except that the list it produces excludes any files submitted for the grantee by someone other than the grantee.

To view a Submission Review, click on the Submission Review link on the **SPARQ Home Page**. The following is a sample Submission Review report:

Similar to Submission History, the Submission Review report can be displayed for a specific program year and quarter at either at the grantee or the sub-grantee level.

C. REPORTS

Management Reports is currently the only function listed in the Reporting Section of the **SPARQ Home Page**. A variety of standard management reports are planned for SPARQ v2 and will be released as they become available.

To access these reports, click on the Management Reports link on the **SPARQ Home Page** and the following screen will be displayed:

Reports are grouped into five convenient categories as shown above. Specific links will be enabled as reports become available.

Note: *Ad Hoc Reporting* is planned for a later release of SPARQ. See Chapter IX for a brief overview of this function.

Users will access the *Ad Hoc Reporting* function from a link in this section when it is implemented.

D. SYSTEM TOOLS

1. *Participant Search:*

This new function allows users to search for SCSEP participants by Last Name or Social Security Number. Users have the option of searching only their data or the entire SCSEP database (program-wide). Both WDCS and Non-DCS Users are strongly encouraged to utilize this function to help prevent duplicate SSN errors as well as overlapping enrollment errors at the time of data entry/submission.

To use this function, click on the Participant Search link on the left side of the **SPARQ Home Page.** When the **Participant Search Screen** opens:

enter a last name (either partial or whole) and select the type of search desired – program-wide or limited to the database for which the user is authorized. Then click on **SEARCH:**

When the screen is refreshed, it will display a table of participant names that ***begin with*** the value that was entered into the Last Name field:

To view basic information for a specific participant, click on the **SELECT** button located to the left of the participant's name:

2. Organization Search:

This new function allows users to search for host agencies, employers and training providers by organization name and/or SCSEP Type. It is similar to the *Participant Search* function in that users have the option of searching only their data or the entire SCSEP database (program-wide). Like *Participant Search*, this function can also assist in the prevention of duplicate records.

To use this function, click on the Organization Search link on the left side of the **SPARQ Home Page.** When the **Organization Search Screen** opens:

the user selects which SCSEP Type(s) to include in search results. Note that more than one SCSEP Type can be selected for a given search.

In addition, the user can choose one of four Search Types:

BEGINS WITH – SPARQ will return all records that *begin with* the letter combination that was input into the Organization Name field. For example, if "WOR" is entered, SPARQ will return record such as WORLD TRAVEL and WORTHINGTON'S MEN'S SHOP.

CONTAINS – SPARQ will return all records that *contain* the letter combination that was input into the Organization Name field. For example, if "AMER" is entered, records such as **AMER**ICAN PLASTICS and CR**AMER** ELECTRONICS will be included in the search results.

EXACT – SPARQ will return only those records that are identical to what was input into the Organization Name field. For example, if "ABC Training" is entered, SPARQ will display ABC TRAINING, but not ABC TRAINING, INC. or ABC TRAINERS.

FUZZY – When this search type is chosen, SPARQ will return all records that have a name similar to what is input into the Organization Name field. For example, if "ROSS & ASSOCIATES" is entered, SPARQ may return records such as ROSE'S ANTIQUE SHOPPE, ASSOCIATION OF RETIRED TEACHERS, RUSSELL STOVER CANDIES, SPELLMAN & ASSOC., etc.

Note that SPARQ defaults to a Search Type of "Begins With".

3. *SPARQ User Accounts:*

Unlike the other universal SPARQ functions, **SPARQ User Account** is limited to those users who have been designated as Grantee and Sub-grantee Administrators. It is a mechanism for these authorized users to set up new SPARQ User IDs, to assign roles and permissions to those new users, and when necessary, to reset passwords. This function is described in detail in Chapter 3, Section B.

4. *My User Info:*

The *My User Info* function allows the user to review his privileges at any time. It also allows the user to change his password whenever he chooses. To access this function, click on the My User Info link on the **SPARQ Home Page** and the following screen will appear:

The upper portion of the screen displays the user information that your Grantee/Sub-grantee Administrator entered when first establishing your SPARQ account. The lower portion of the screen lists the specific privileges that you have been granted – what roles you can assume when working in SPARQ, the groups of data you can access, and the rights or permissions that you have been given to create and alter data.

In order to change your password, click on the Change Your Password link. The **Change Password Screen** opens:

Enter the password you are currently using into the "Current Password" field.

Enter a new password into the New Password field, and then again into the "Confirm New Password" field.

Click **SUBMIT** and the following confirmation message will be displayed:

VI. ADMINISTRATIVE FUNCTIONS

A. ADDING/EDITING SCSEP ORGANIZATIONS

1. *Adding SCSEP Organizations:*

The functionality for adding SCSEP organizations is accessed from the **WDCS Main Screen**. To start, click on the **ORGANIZATIONS** button in the Administrative Functions section:

The following **Organizations Screen** will open:

Users can add information about a Host Agency, Employer or Training Facility by selecting one of the SCSEP Types and then clicking on **ADD**.

A new data entry screen for the type of organization selected by the user will open. Depending on the SCSEP Type selected, one of the following screens will appear:

For SCSEP Type = Host Agency:

For SCSEP Type = Employer:

For SCSEP Type = Training Provider:

Enter the appropriate information into the blank cells on the data entry screen and click on **SAVE** to create a new organization record in SPARQ.

Note that when initially creating an organization record, the organization may be designated as only one SCSEP Type – host agency, employer or training provider. However, the program allows a given organization to play more than role (for example, an organization may serve as both Host Agency and Employer). In these cases, the *Edit Organization* function can be used to indicate that the organization serves as more than one SCSEP Type. See next section for more information.

<div style="border: 2px solid black;">

** IMPORTANT **

- Federal Employer Identification Numbers (FEINs) must be unique in SPARQ.

- The combination of (Organization Name + State) must also be unique.

</div>

2. *Editing SCSEP Organizations:*

To edit a SCSEP organization that was previously entered into SPARQ, the user first accesses the function by clicking on the **ORGANIZATIONS** button in the Administrative Functions section of the **WDCS Main Screen.**
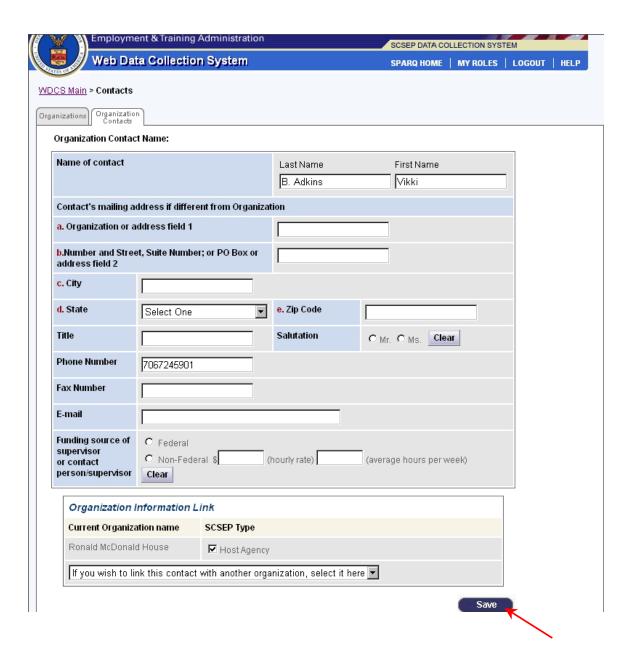
When the **Organizations Screen** opens, the user utilizes the search function to locate the specific organization record to be updated. Entering the name of the organization to be edited into the Organization Name field and clicking on **FIND** will produce a list of records that match the entered criteria.

Instead of entering a specific organization's name in its entirety (e.g., "ABC Professionals"), a single letter (e.g., "A") or a combination of letters (e.g., "ABC") may be input into the Organization Name field. In the latter two cases, the list of records that is returned will contain all organizations with names that *begin with* that letter or letter combination. The user also has the option of further limiting the search results by specifying a SCSEP Type.

Organizations will be listed in alphabetical order in the search results. For example:

Click on **EDIT** for the organization to be updated and the data entry screen for that organization will open:

At this point, the user may change any of the existing data or input new data previously left blank.

Certain fields on the screen may be grayed out, depending on the SCSEP Type of the organization selected for editing. If the organization is only a Host Agency, the users will not be able to add or edit fields that apply only to Employers and Training Providers. Similarly, if the organization serves as only a SCSEP employer or as only a SCSEP Training Provider, the fields that are not applicable will be grayed out.

When editing an organization, the user may designate, if applicable, a second and third SCSEP Type for the organization. Simply click on the box for the appropriate SCSEP Type(s). Once an additional SCSEP Type is checked, additional fields specific to that SCSEP Type will become available for data entry.

Once all editing changes have been made, the user must click on **SAVE** to update the database.

B. ADDING/EDITING ORGANIZATION CONTACTS

1. *Adding Organization Contacts:*

The functionality for adding organization contacts is accessed from the **WDCS Main Screen**. To start, click on the **ORGANIZATIONS** button in the Administrative Functions section:

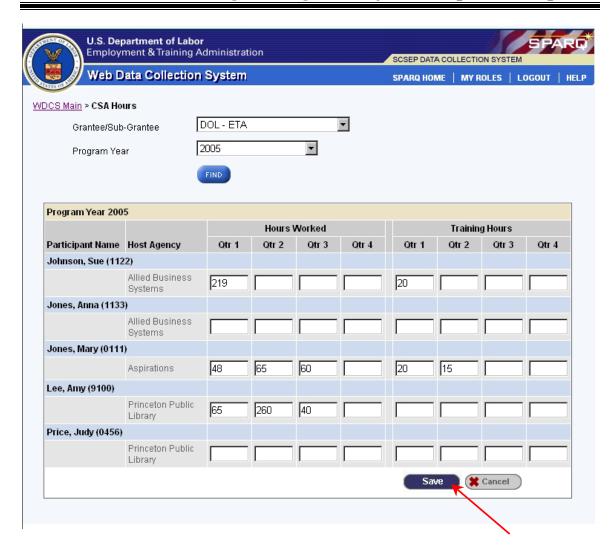After the **Organizations Screen** opens, click on the ORGANIZATIONS CONTACT tab.

When the Organizations Contact tab opens, click on the **ADD CONTACT** button to begin the process of entering a new organization contact:

Enter the appropriate information into the blank cells on the data entry screen. Before saving the data, the user must also link the organization contact to a specific organization. Use the Organization Information Link Box to choose an organization from a list of all of those available:

When the screen is refreshed, the selected organization will be displayed under Current Organization Name:

Choose the appropriate SCSEP Type from those listed (1), then click on **SAVE** (2) to create a new organization contact record in SPARQ.

2. *Editing Organization Contacts:*

The functionality for editing organization contacts is also accessed by clicking on the **Organizations** button in the Administrative Functions section of the **WDCS Main Screen.** When the **Organization Screen** opens, click on the Organization Contacts tab.
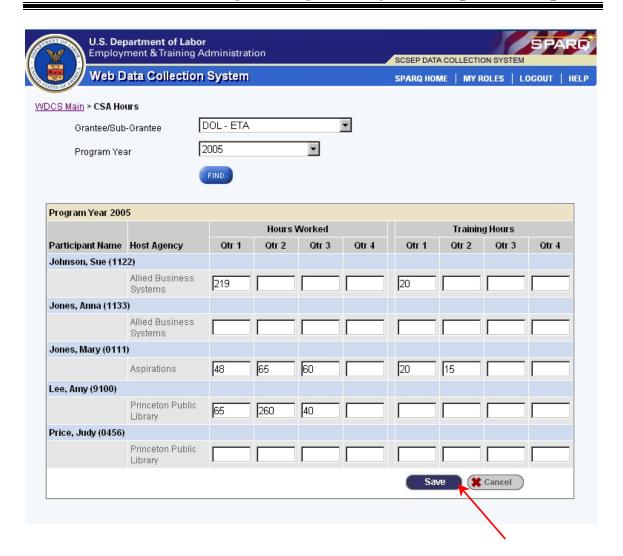

On the **Organization Contacts Screen,** the user first uses the search function to locate the specific organization contact record to be edited. This search function is similar to the **Organization Search** function. Enter the last name of the organization contact to be edited, then click on **FIND.** A list of records that match the entry will be displayed.

Instead of entering a specific organization contact's name in its entirety (e.g., "ABC Professionals"), a single letter (e.g., "A") or a combination of letters (e.g., "ABC") may be input. In the latter two cases, the list of records that is returned will contain all organization contacts with names that *begin with* that letter or letter combination.

In the search results, organization contacts will be listed in alphabetical order. For example:

When the search results appear, click on the **EDIT** button next to the organization contact record to be edited. This opens a data entry screen for the organization contact selected by the user:

At this point, the user may change any of the existing data or input new data previously left blank. When done, the user must click on **SAVE** to update the database.

C. ADDING/EDITING CSA AND TRAINING HOURS FOR MULTIPLE PARTICIPANTS

1. *Adding CSA and Training Hours for Multiple Participants:*

The functionality for entering CSA Total Paid Hours and Total Training Hours for multiple users can be accessed from the **WDCS Main Screen.** To start, click on the **CSA HOURS** button in the Administrative Functions section:

When the **CSA Hours Screen** opens:

(1) Select the correct set of data to work with using the Grantee/Sub-Grantee dropdown. In addition, select the appropriate Program Year from those available in the Program Year dropdown

(2) Clicking on **FIND** refreshes the **CSA Hours Screen** and displays a new data entry section:

The table lists in alphabetical order all participants with one or more active assignments in the selected program year. At this point, the user may enter CSA Total Paid Hours and/or Total Training Hours by quarter for the assignment(s) of any of the participants listed. When data entry is completed, the user must click on **SAVE** to update the database.

2. *Editing CSA and Training Hours for Multiple Participants:*

The functionality for editing CSA and Training Hours for multiple participants is also accessed by clicking on the **CSA HOURS** button in the Administrative Functions section of the **WDCS Main Screen:**

When the **CSA Hours Screen** opens:

(1)   Select the correct set of data to work with as well as the appropriate Program Year using the dropdowns.

(2)   Click on **FIND** to refresh the **CSA Hours Screen** so that it displays the data entry section:

Similar to the **Add CSA Hours** function, the **Edit CSA Hours** function displays in alphabetical order all participants with an active assignment in the selected program year. At this point the user may change any CSA Total Paid Hours field and/or Total Training Hours field previously entered or add new data. When all editing is completed, the user must click on **SAVE** to update the database.

VII. PARTICIPANT FUNCTIONS

A. ADDING A NEW PARTICIPANT

Before attempting to add a new participant record to SPARQ, it is strongly recommended that the user search for the person in the SPARQ database. By using the program-wide *Participant Search* function on the **SPARQ Home Page,** the user can identify if a database record already exists for the person. (See Chapter 5, Section D for instructions).

Once it has been confirmed that the new applicant/participant does not already exist in SPARQ, he can be added to the database. The *Add Participant* function allows the user to do two things: 1) add basic participant data into the system, and 2) create an enrollment for the participant.

To begin the process, click on the **ADD PARTICIPANT** button on the **WDCS Main Screen**:

The screen that will appear next is the **Participant Information Screen**:

<table>
<tr><td colspan="2">** IMPORTANT **</td></tr>
</table>

** IMPORTANT **

Three fields are required in order to create a new Participant record – Last name, Social Security Number and Application Date.

If the user attempts to add a new participant using a Social Security Number that already exists in SPARQ, the following message will appear:

At this point, the user can either add a new enrollment for the existing participant, or return to the **WDCS Main Screen** and begin again.

If the Social Security Number that is entered is not a duplicate, the user may navigate to the other participant screens after completing data entry on this screen. This can be accomplished either by clicking on the **NEXT** button at the bottom of the page or by selecting one of the choices on the navigation bubble line located in the upper left. Note that the navigation bubble line presents the participant screens in the same logical sequence they appeared in the previous version of the DCS. While screens do not have to be

accessed in order, for the purposes of this discussion, they will be reviewed in sequence.

Clicking on the **NEXT** button, the user is brought to the **Eligibility Information Screen**:

Note that basic participant identifying information is displayed in the upper right corner of this screen. This information serves as a reminder to the user of which record he is working with. Participant identifying information can be found on most SPARQ detail screens. The specific data that are displayed are dependent upon what information has already been entered into the system for this person.

When all appropriate data has been entered into the **Eligibility Information Screen**, the user may continue to the **Other Personal Characteristics Screen:**

Adapting note: (heading)

A. Adding a New Participant

The fourth screen in the **Add Participant** function is the **Eligibility Determination Screen**:

When done with the **Eligibility Determination Screen,** the user may navigate to the **Enrollment Information Screen**:

After entering data on this screen, the user should click on **SAVE** at the bottom of the screen to update the SPARQ database. A confirmation message will be displayed in red in the upper left of the screen:

B. EDITING A PARTICIPANT

To edit the basic information about a participant, the user must first use the *Participant Search* function on the **WDCS Main Screen to** locate the record of the participant.

When the user clicks on the **EDIT** button next to the name of the desired participant, **Edit Participant Screen** is displayed:

Once the appropriate data has been updated, the user clicks on **SAVE** to update the database.

C. EDITING AN ENROLLMENT

To edit an existing enrollment record, the user must first use the *Participant Search* function on the **WDCS Main Screen to** locate the record of the participant. The user selects the participant that is to be edited from the list of participants that is displayed:

When the screen refreshes and the Selected Record Box appears, all enrollments for the participant will be displayed:

The user then selects the enrollment to be edited by clicking on the **EDIT** button next to the appropriate record. Note that if there is only one enrollment, it will be automatically selected.

At this point the user will be brought to the **Participant Information Screen**:

Using the **NEXT** and **PREVIOUS** buttons at the bottom of the screen or the navigation bubble line, the user can move to the screen(s) that contain the data to be changed or added. Once the appropriate enrollment data have been updated, the user clicks on **SAVE** to update the database.

D. ADDING/EDITING COMMUNITY SERVICE ASSIGNMENTS (CSAs)

1. *Adding a Community Service Assignment:*

To add a Community Service Assignment record to an existing participant, the user must first locate the appropriate record using the ***Participant Search*** function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new assignment is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **ASSIGNMENTS/EXITS** button and a new Assignments/Exits Box will appear listing the existing assignments (if any) that are associated with the selected enrollment:

To add a new assignment, click on **ADD ASSIGNMENTS AND EXITS** and the first screen in the *Add Assignment* function, **Host Agency Information**, will be displayed:

On this screen, all available host agencies will be listed. The user may select one of the host agencies shown by clicking on the appropriate radio button. Alternatively, the user may add a new host agency to the database by clicking on the Add New Host Agency link.
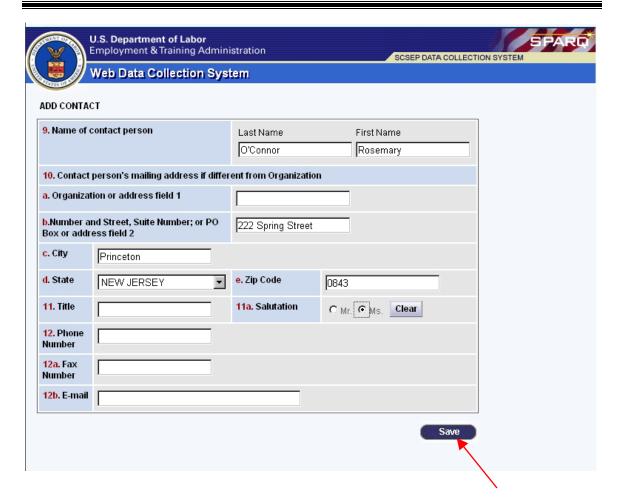
If an existing host agency is chosen, the **Host Agency Information Screen** is refreshed and the data associated with that host agency is now displayed on the screen.

If, instead, a new host agency is to be added, the **Add Host Agency Screen** is displayed when the user chooses the Add New Host Agency link:

The user enters the appropriate data into the blank cells:

and clicks on **SAVE** to create the new host agency record in SPARQ.

At this point, the user is returned to the **Host Agency Information Screen** where the newly created host agency is now displayed in the list of available host agencies. The user must now select the new host agency record for the assignment that is currently being created.

The screens in the *Add Assignment* function do not have to be accessed in the order they appear in the navigation bubble line. For the purposes of this discussion, however, they will be reviewed in sequence.

The second screen in the *Add Assignment* function is the **Contact Information Screen:** Like the **Host Agency Screen**, this screen will list all contact persons already created and associated with the chosen host agency. The user may select one of the contact persons shown by clicking on the appropriate radio button. Alternatively, the user may add a new contact person to the database by clicking on the Add New Contact Person link.

If an existing contact person is chosen, the **Contact Information Screen** is refreshed and the data associated with that contact person is now displayed on the screen:

If, instead, a new contact person is to be added, the **Add Contact Screen** is displayed when the user chooses the Add New Contact link:

The user enters the appropriate data into the blank cells:

and clicks on **SAVE** to create the new contact person record in SPARQ.

At this point, the user is returned to the **Contact Information Screen** where the newly created contact person is now displayed in the list of available contact persons. The user must now select the new contact person record for the assignment that he is currently creating.

The next screen in the ***Add Assignment*** function is the **Assignment Information Screen:**

Once the appropriate assignment data have been updated, the user clicks on **SAVE** to update the database.

When adding a new assignment, the **Training Information** and **Exit Information Screens**, are not normally accessed. For this reason, these screens will be discussed separately in later sections of this chapter (Sections F and H, respectively).

2. *Editing a Community Service Assignment Record:*

To edit an existing assignment record, the user must first locate the appropriate participant record using the *Participant Search* function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:
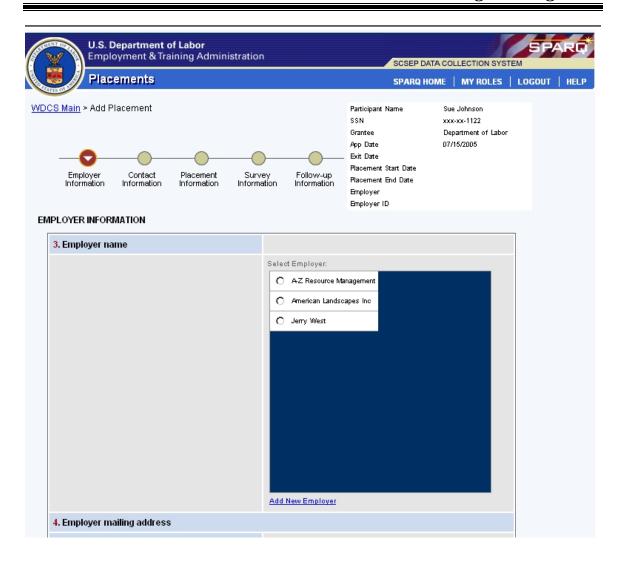

When the screen refreshes and the Selected Record Box appears:

(1)   Choose the enrollment that the assignment to be edited is associated with. Note that if there is only one enrollment for the participant, it will be automatically selected.

(2)   When the **ASSIGNMENTS/EXITS** button is clicked, a new Assignments/Exits Box will appear listing the existing assignments (if any) that are associated with the selected enrollment:

To update an existing assignment, click on **EDIT** for the appropriate assignment and the **Assignment Information Screen** will be displayed:

Using the **NEXT** and **PREVIOUS** buttons at the bottom of the screen or the navigation bubble line, the user can move to the screen(s) that contain the data to be changed or added. Once the appropriate assignment data have been updated, the user clicks on **SAVE** to update the database.

E. ADDING/EDITING PLACEMENTS (UEs)

1. *Adding a New Placement Record:*

To add a new Unsubsidized Employment or Placement record to an existing participant, the user must first locate the appropriate record using the *Participant Search* function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:

When the screen refreshes and the Selected Record Box appears:

---

(1) Choose the enrollment that the new placement is to be associated with. Note that if the participant has only one enrollment, that enrollment is automatically selected.

(2) Then click on the **PLACEMENTS** button. A new Placements section will appear directly below the Selected Record Box listing the existing placements (if any) that are associated with the selected enrollment:

To add a new placement, click on **ADD PLACEMENTS** and the first screen in the *Add Placement* function, **Employer Information**, will be displayed:

On this screen, all available employers will be listed. The user may select one of the employers shown by clicking on the appropriate radio button. Alternatively, the user may add a new employer to the database by clicking on the Add New Employer link.

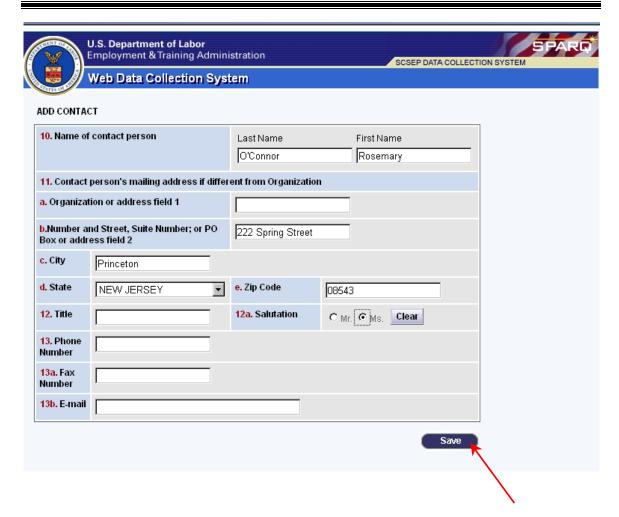If an existing employer is chosen, the **Employer Information Screen** is refreshed and the data associated with that employer is now displayed on the screen:

If, instead, a new employer is to be added, the **Add Employer Screen** is displayed when the user chooses the Add New Employer link:
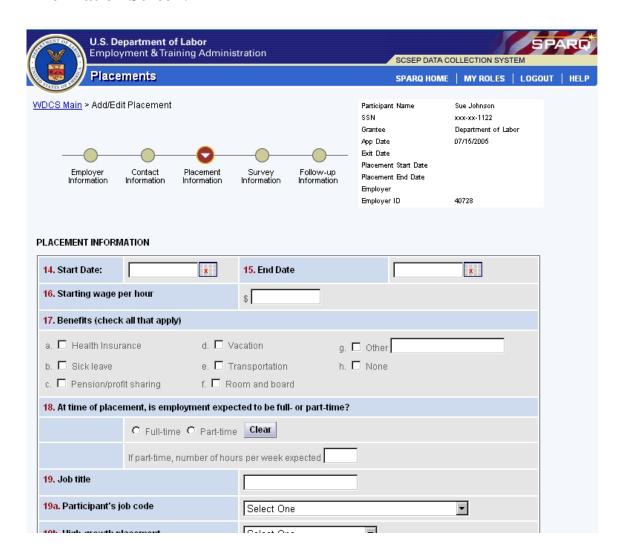
The user enters the appropriate data into the blank cells:

and clicks on **SAVE** to create the new employer record in SPARQ.

At this point, the user is returned to the **Employer Information Screen** where the newly created employer is now displayed in the list of available employers. The user must now select the new employer record for the placement that he is currently creating.
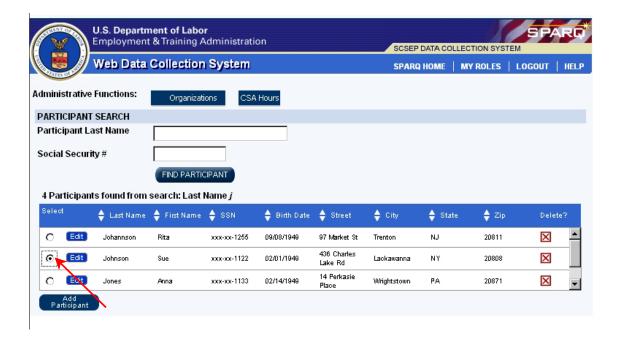
The screens in the *Add Placement* function do not have to be accessed in the order they appear in the navigation bubble line. For the purposes of this discussion, however, they are reviewed in sequence.

The second screen in the *Add Placement* function is the **Contact Information Screen**. Similar to the **Contact Information Screen** in the *Add Assignment* function, this screen will list all contact persons previously entered and associated with the chosen employer. The user may select one of the contact persons shown by clicking on the appropriate radio button. Alternatively, the user may add a new contact person to the database by clicking on the Add New Contact Person link.

If an existing contact person is chosen, the **Contact Information Screen** will be refreshed and the data associated with that contact person is now displayed on the screen:

If, instead, a new contact person is to be added, the **Add Contact Screen** is displayed when the user chooses the Add Contact Person link:

The user enters the appropriate data into the blank cells:

and clicks on **SAVE** to create the new contact person record in SPARQ.

At this point, the user is returned to the **Contact Information Screen** where the newly created contact person is now displayed in the list of available contact persons. The user must now select the new contact person record for the placement that he is currently creating.

The next screen in the *Add Placement* function is the **Placement Information Screen:**

When adding a new placement, the **Survey Information** and **Follow-up Information Screens** are not normally accessed. For this reason, these screens will be discussed separately in later sections of this chapter (Sections J and I, respectively).

2. *Editing a Placement Record:*

To edit an existing placement record, the user must first locate the appropriate participant record using the ***Participant Search*** function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:
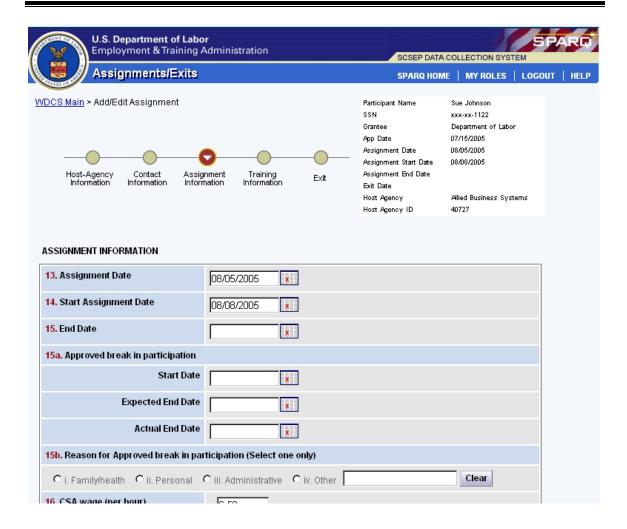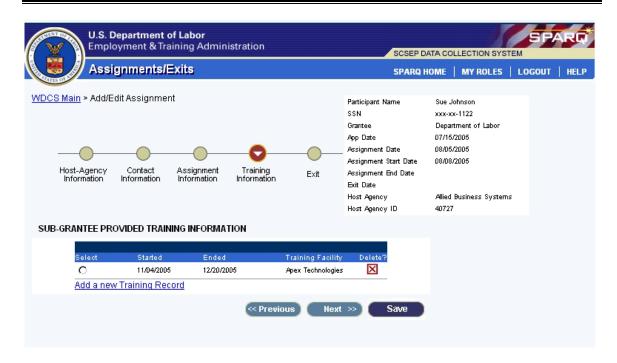

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the placement to be edited is associated with.
Note that if there is only one enrollment for the participant, it is
automatically selected.

(2) Click on the **PLACEMENTS** button. A new Placements Box will
appear on the **WDCS Main Screen** listing the existing placements (if
any) that are associated with the selected enrollment:

To update an existing placement, click on **EDIT** for the appropriate placement and the **Placement Information Screen** will be displayed:

Using the **NEXT** and **PREVIOUS** buttons at the bottom of the screen or the navigation bubble line, the user can move to the screen(s) that contain the data to be changed or added. Once the appropriate placement data have been updated, the user clicks on **SAVE t**o update the database.

F. ADDING/EDITING A TRAINING RECORD

1. *Adding a Training Record:*

To add a Training Record for an existing participant, the user must first locate the appropriate record using the *Participant Search* function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new training record is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Then click on the **ASSIGNMENTS/EXITS** button. A new Assignments/Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:

To add a training record to an existing assignment, click on the **EDIT** button next to the appropriate assignment. The following screen will appear:

From the **Assignment Information Screen**, the user navigates to the Sib-Grantee **Training Information Screen** using either the **NEXT** button at the bottom of the screen or the navigation bubble line:

To view the data entry portion of the **Training Information Screen**, click on the Add a new Training Record link.

The **Training Information Screen** is similar to both the **Host Agency Information Screen** in the *Add Assignment* function and the **Employer Information Screen** in the *Add Placement* function. It displays all available training providers and the user may select one of them by clicking on the appropriate radio button. Alternatively, the user may add a new training provider record to the database by clicking on the Add New Training Provider/Employer link.

If an existing training provider is chosen, the Sub-grantee Provided **Training Information Screen** will be refreshed and the data associated with that training provider is now displayed on the screen:

If, instead, a new training provider is to be added, the **Add Training Provider Screen** is displayed when the user chooses the Add New Training Provider/Employer link:
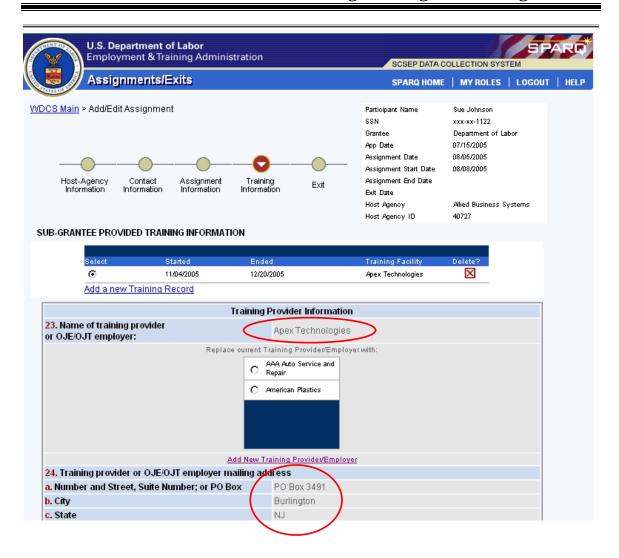

The user enters the appropriate data into the blank cells:
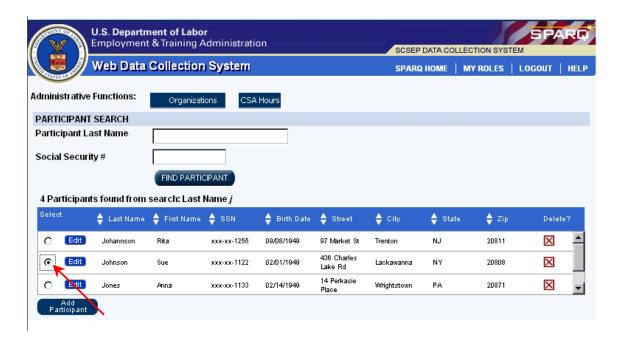
and clicks on **SAVE** to create the new training provider record in SPARQ.

The new training provider will now be automatically displayed as the selected training provider on the **Training Information Screen:**
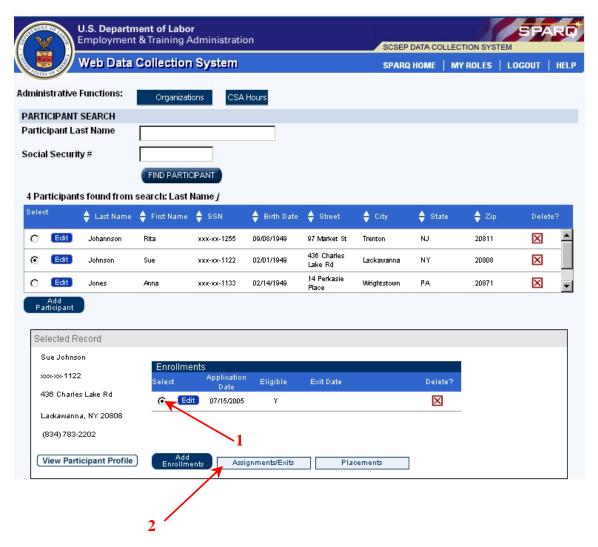
At this point, the user enters any additional training data that is available and clicks on **SAVE** to update the database.
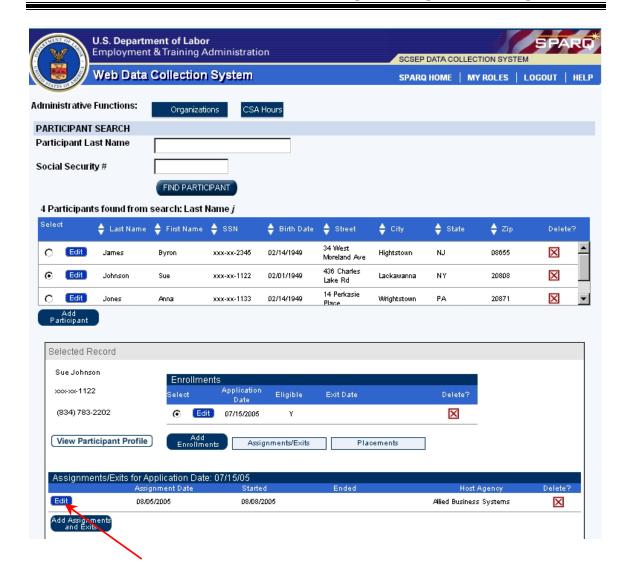
2. *Editing a Training Record:*

To edit a previously entered training record, the user must first locate the appropriate participant using the *Participant Search* function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:
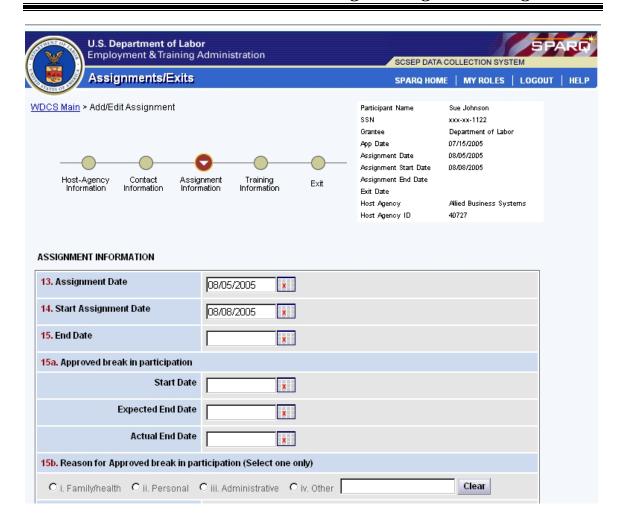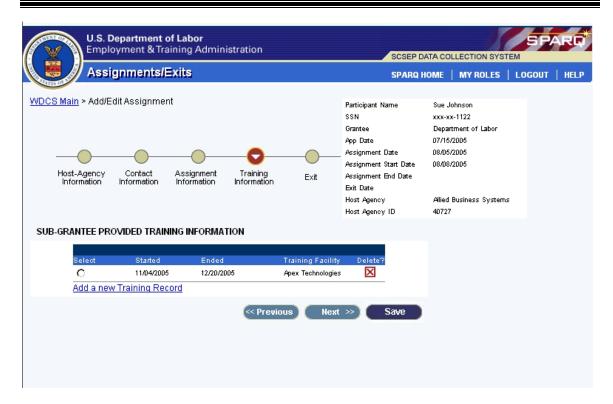

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the training record to be edited is associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **ASSIGNMENTS/EXITS** button. A new Assignments Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) that are associated with the selected enrollment:
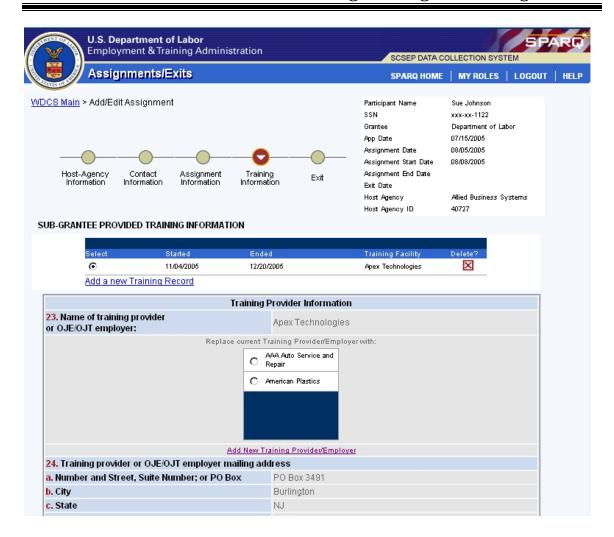
To update an existing training record, click on **EDIT** for the assignment it is associated with and the **Assignment Information Screen** will be displayed:

Next, navigate to the **Training Information Screen:**

Select the appropriate training record from those listed and the detailed **Training Information Screen** will open:
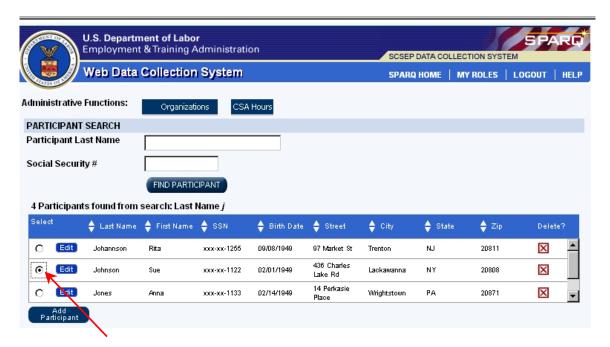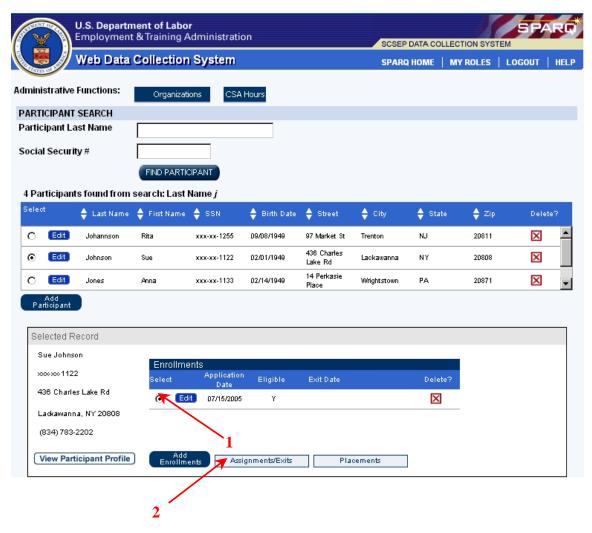
The user changes the existing data and/or adds new data as needed, then clicks **SAVE** to update the database.

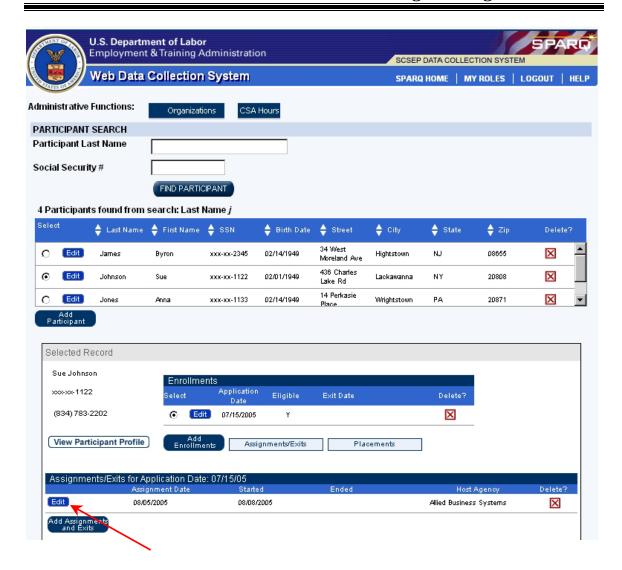# G. ADDING/EDITING CSA PAID HOURS AND TRAINING HOURS

1. *Adding CSA Paid Hours and Training Hours:*

To add CSA Paid Hours and Training Hours to an existing participant's record, the user must first locate the appropriate record using the *Participant Search* function on the **WDCS Main Screen**. The user selects the participant record to work with from the list of participants that is displayed:
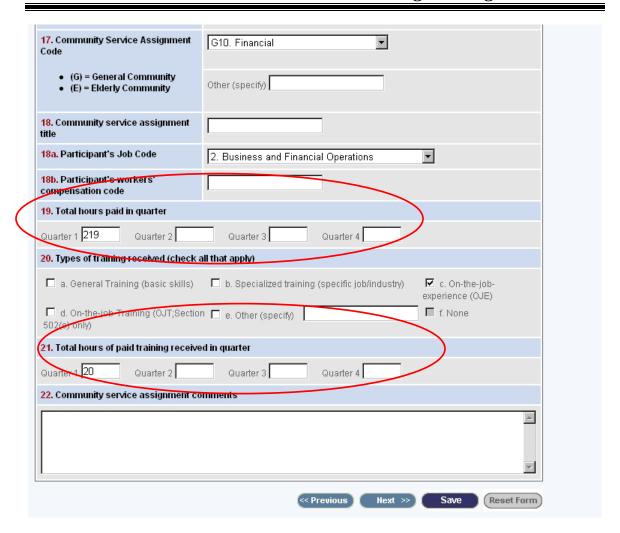

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Then click on the **ASSIGNMENTS/EXITS** button. A new Assignments/Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) that are associated with the selected enrollment.

Click on **EDIT** for the specific assignment record to be updated. The **Assignment Information Screen** will open:

Scroll down to field #19 to enter quarterly CSA Total Paid Hours and to field #21 to enter quarterly Total Training Hours. Once all appropriate CSA hours have been updated, click **SAVE** to update the database.
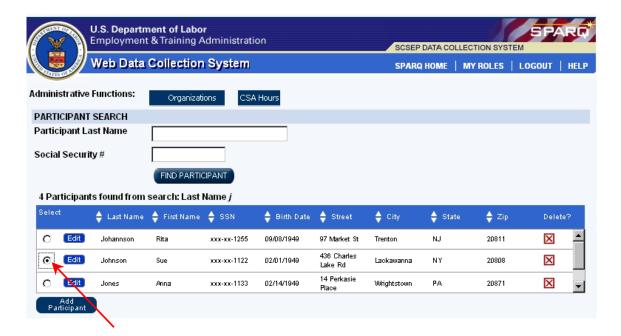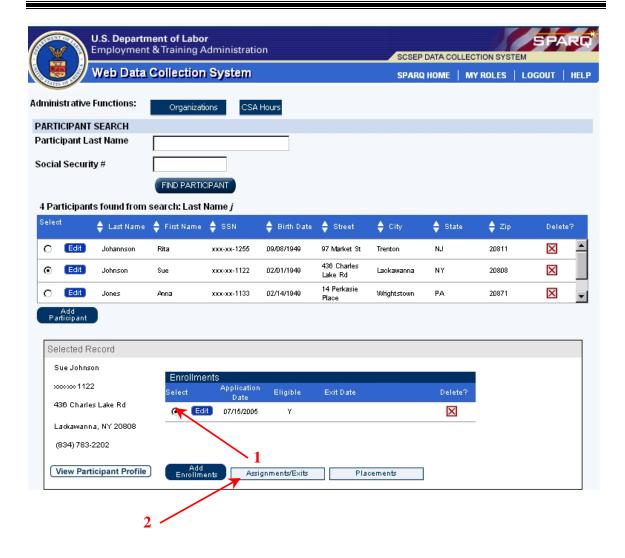
> ### ** IMPORTANT **
>
> When adding quarterly CSA Total Paid Hours and/or Total Training Hours directly to an assignment record, they must be entered for the *current* program year.
>
> To enter CSA Total Paid Hours and/or Total Training Hours for a *previous* program year, the *CSA HOURS* function on the **WDCS Main Screen** must be used.
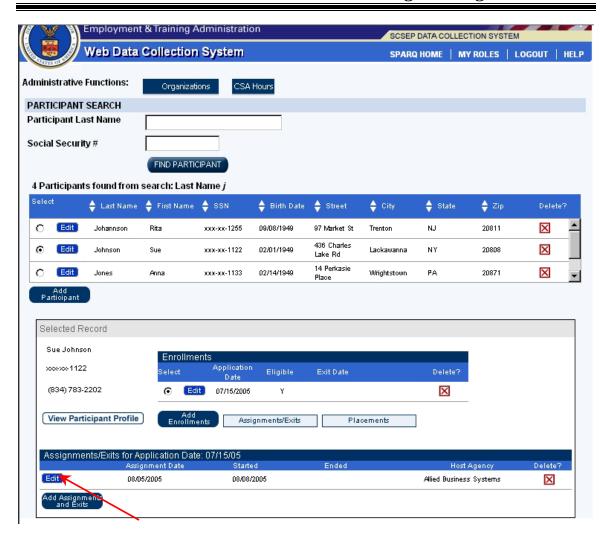
2. Editing CSA Paid Hours and Training Hours:

To edit CSA Paid Hours and Training Hours for an existing participant, the user must first locate the participant by using the ***Participant Search*** function on the WDCS Main Screen. The user selects the participant record to work with from the list of participants that is displayed:

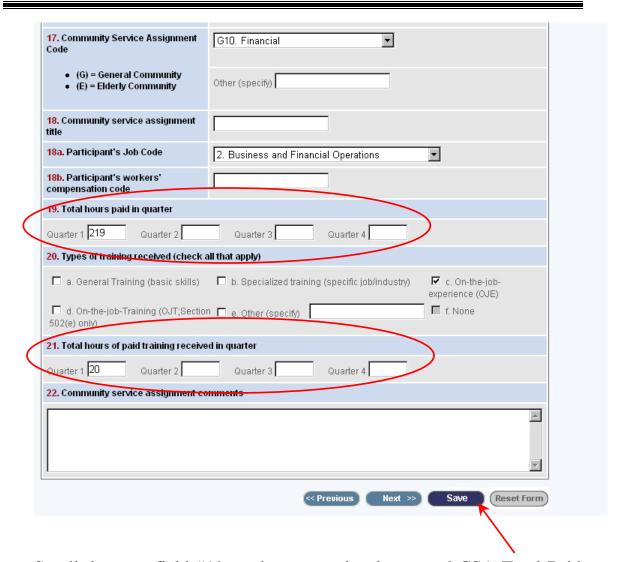When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Then click on the **ASSIGNMENTS/EXITS** button. A new Assignments/Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) that are associated with the selected enrollment.

Click on **EDIT** for the specific assignment record to be updated.

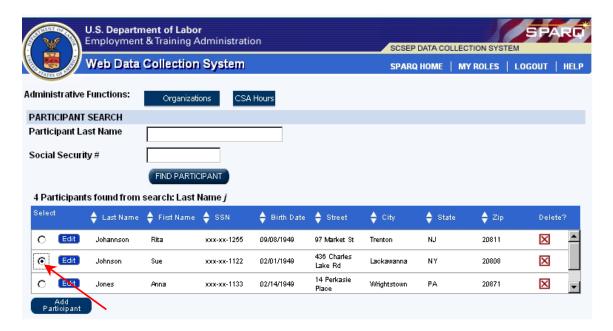When the **Assignment Information Screen** opens:

Scroll down to field #19 to change previously entered CSA Total Paid Hours or to add additional CSA Total Paid Hours. Similarly, to change or add Total Training Hours, scroll down to field #21 and enter the information.
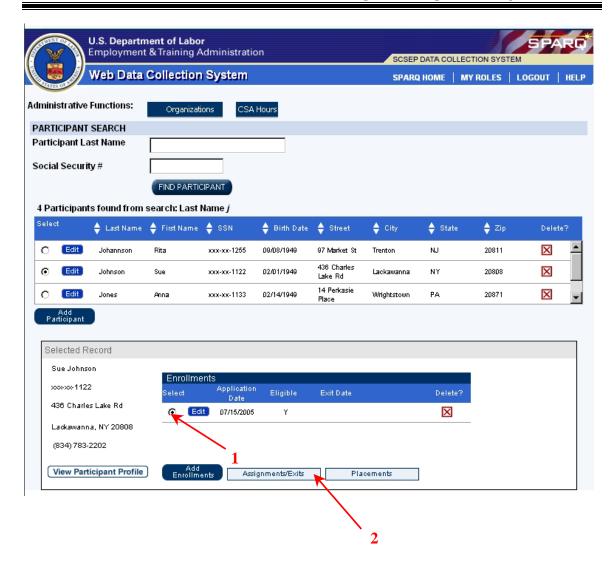
Once all appropriate CSA hours have been updated, click **SAVE** to update the database.
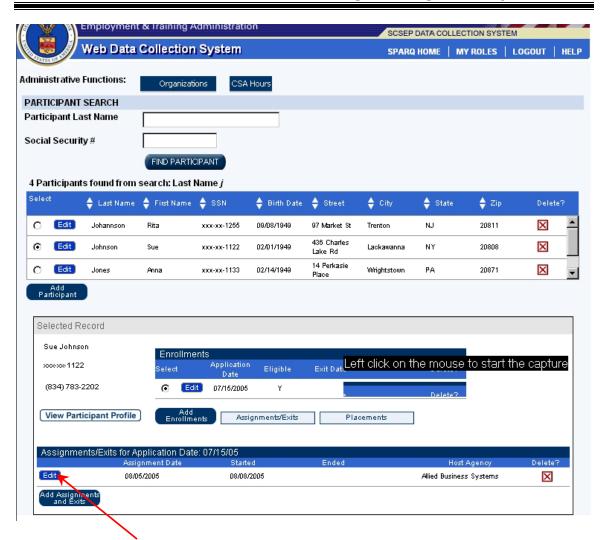
H. ADDING/EDITING EXIT INFORMATION

1. *Adding Exit Information:*

In order to exit a participant, the user must first locate the correct participant record by using the ***Participant Search*** function on the **WDCS Main Screen**. The user selects the participant record to work with from the list of participants that is displayed:

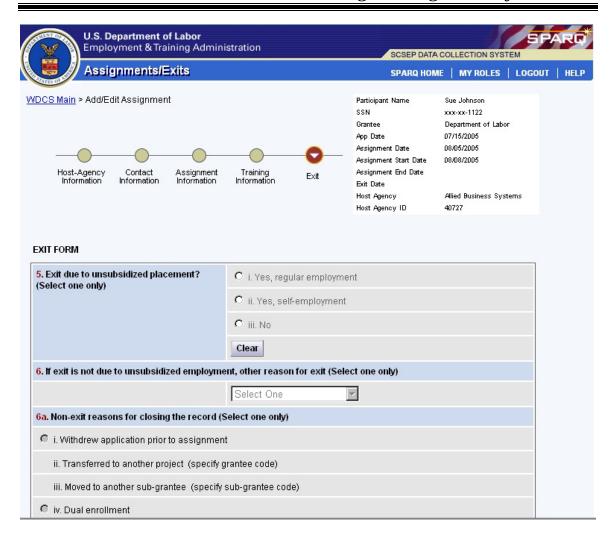When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **ASSIGNMENTS/EXITS** button. A new Assignments/ Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:
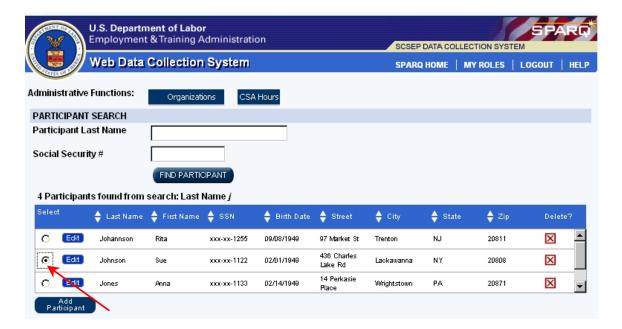
Click on **EDIT** for the specific assignment record to be updated. When the **Assignment Information Screen** opens, the user should enter the data necessary to close the assignment and then proceed to the **Exit Information Screen:**
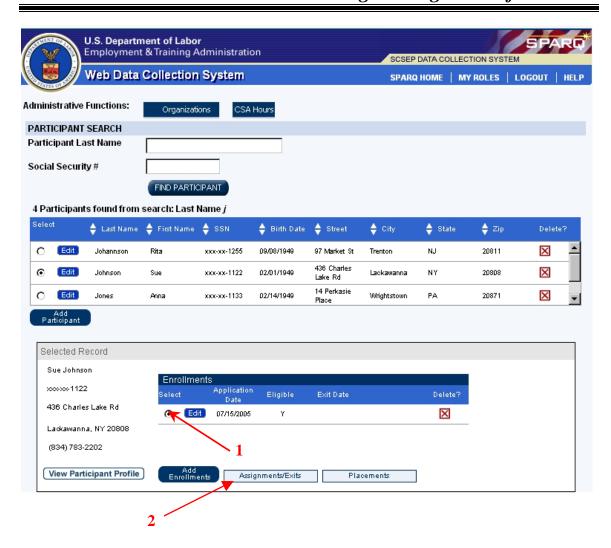
Enter the appropriate exit data into the blank cells and click **SAVE** to update the database.

2. *Editing Exit Information:*

In order to edit a participant's exit information, the user must first locate the correct participant record by using the ***Participant Search*** function on the **WDCS Main Screen**. The user selects the participant record to work with from the list of participants that is displayed:

When the screen refreshes and the Selected Record Box appears:
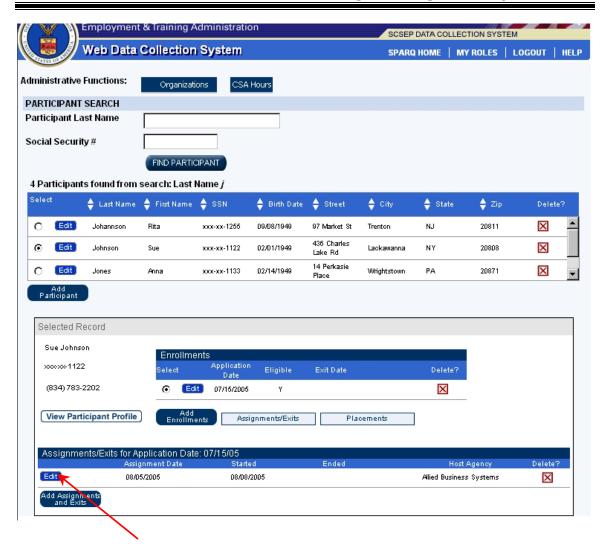
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(1) Choose the enrollment that the new exit data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Then click on the **ASSIGNMENTS/EXITS** button.
A new Assignments/Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:

Click on **EDIT** for the specific assignment record to be updated. When the **Assignment Information Screen** opens, navigate to the **Exit Information Screen**:

Update the previously entered exit information and/or add new exit data, then click **SAVE** to update the database.

I. ADDING/EDITING FOLLOW-UP INFORMATION

1. *Adding Follow-Up Information:*

To enter follow-up data for a placed participant, the use must first locate the participant's record using the ***Participant Search*** function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:
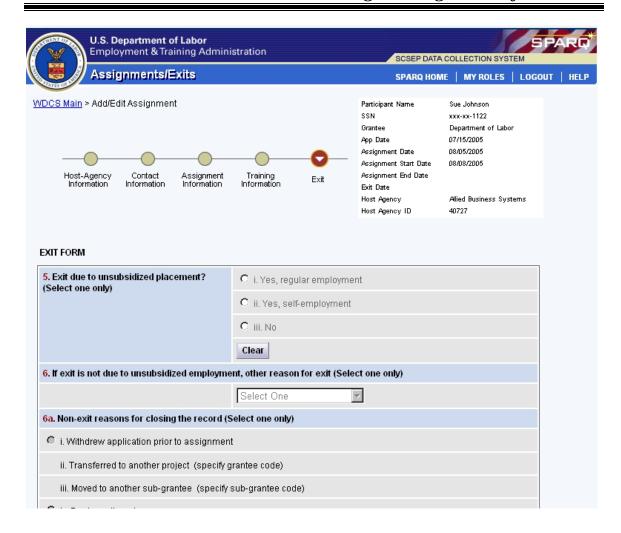

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **PLACEMENTS** button.
A new Assignments/Exits Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:

Click on **EDIT** for the specific placement record to be updated.

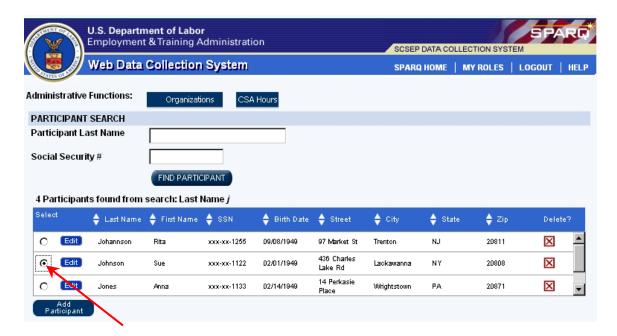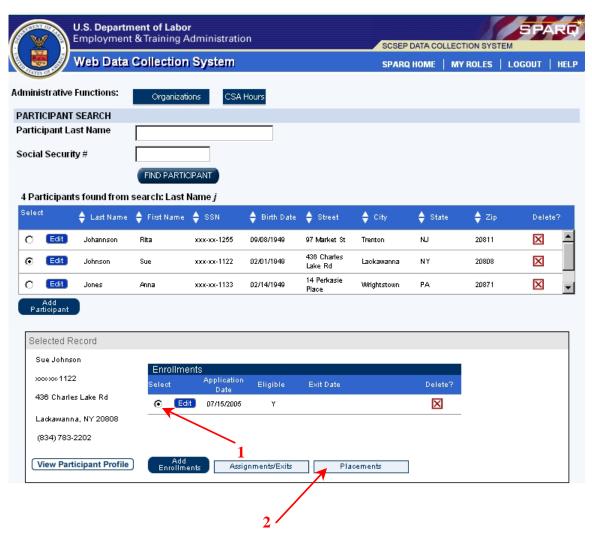When the **Placement Information Screen** opens, navigate to the **Follow-Up Information Screen**:

Enter data into the blank cells as needed and click on **SAVE** to update the database.

2. *Editing Follow-Up Information:*

To edit follow-up data for a placed participant, first locate the participant's record using the *Participant Search* function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:

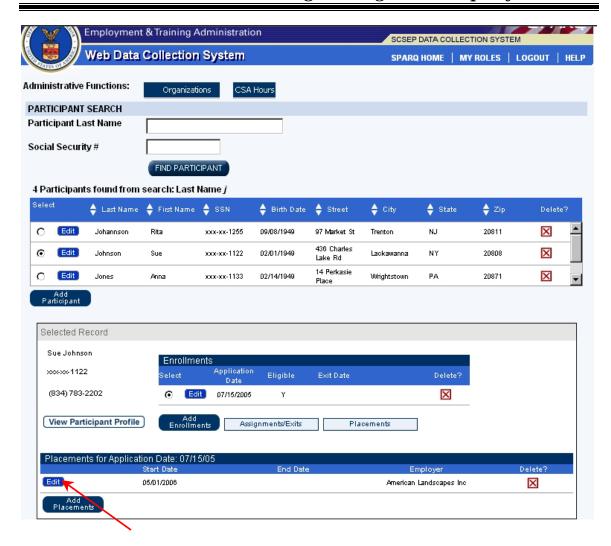When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **PLACEMENTS** button.
A new Placements Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:
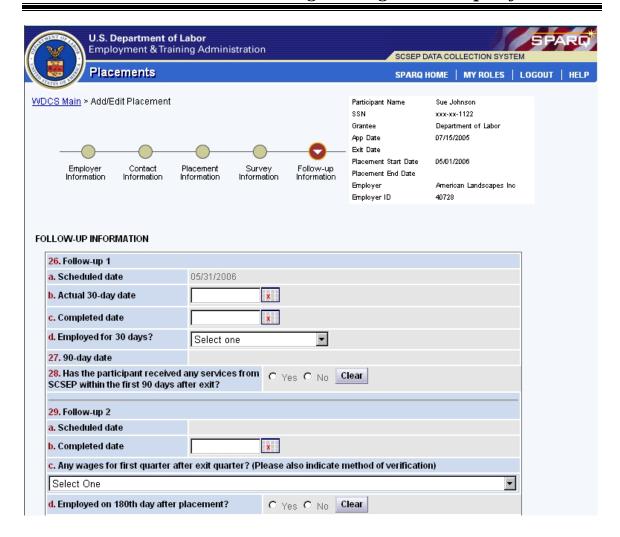
A new Placements Box will appear on **WDCS Main Screen** listing the existing placements (if any) associated with the selected enrollment:

Click on **EDIT** for the specific placement record to be updated.

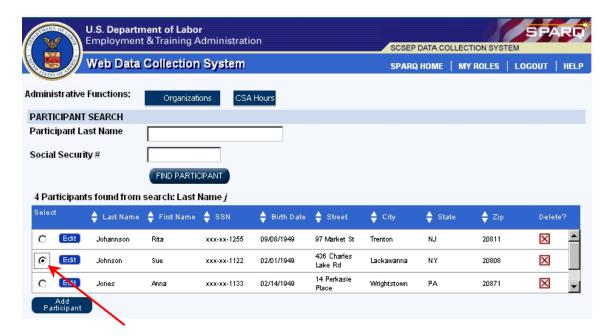When the **Placement Information Screen** opens, navigate to the **Follow-Up Information Screen**.
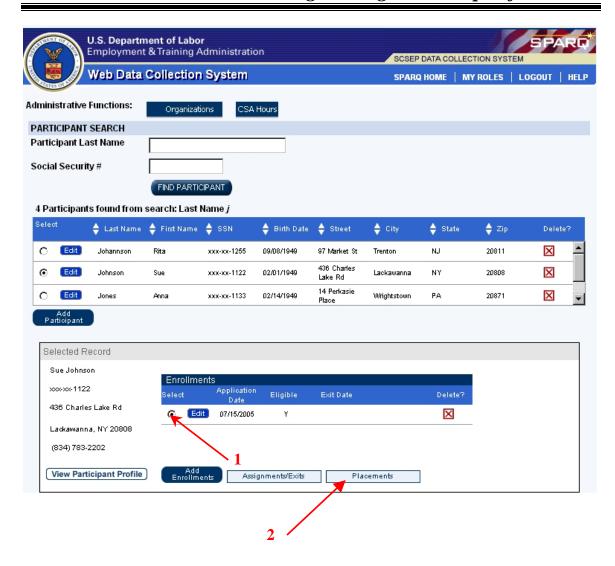

Update the existing follow-up data and/or add additional follow-up information, then click on **SAVE** to update the database.

J. ADDING/EDITING CUSTOMER SATISFACTION SURVEY INFORMATION

1. *Adding Customer Satisfaction Survey Information:*

To update an existing participant's record with customer satisfaction survey data, the user must first locate the appropriate record using the ***Participant Search*** function on the **WDCS Main Screen.**   The user selects the participant record to work with from the list of participants that is displayed:
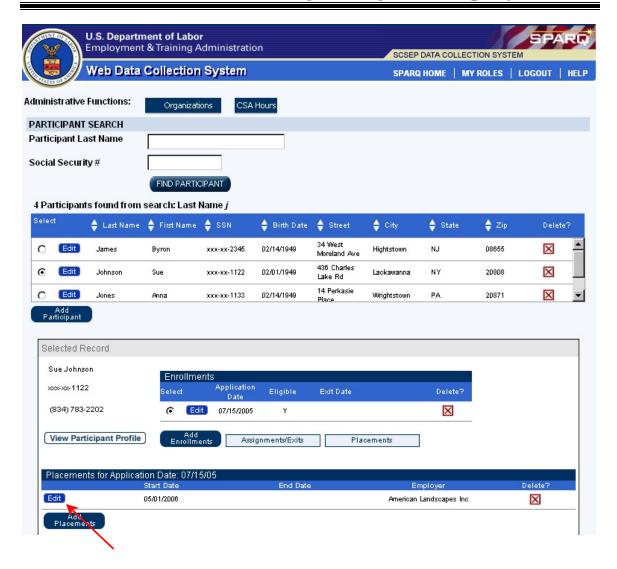

When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new follow-up data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected. Then click on the **PLACEMENTS** button.

(2) Click on the **PLACEMENTS** button.
A new Assignments/Exits Box will appear **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:

Click on **EDIT** for the specific assignment record to be updated. When the **Assignment Information Screen** opens, navigate to the **Survey Information Screen**:
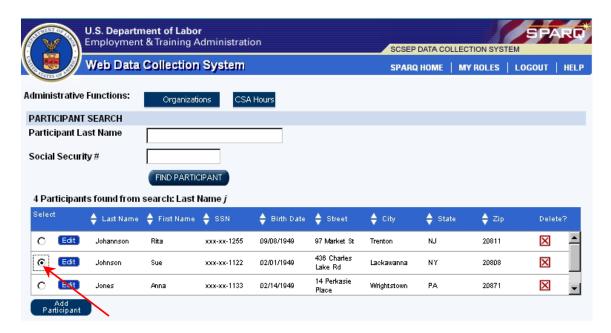
Enter data into the blank cells as needed and click on **SAVE** to update the database.

2. <u>*Editing Customer Satisfaction Survey Information:*</u>

To edit existing customer satisfaction survey data for a participant, first locate the participant using the ***Participant Search*** function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:
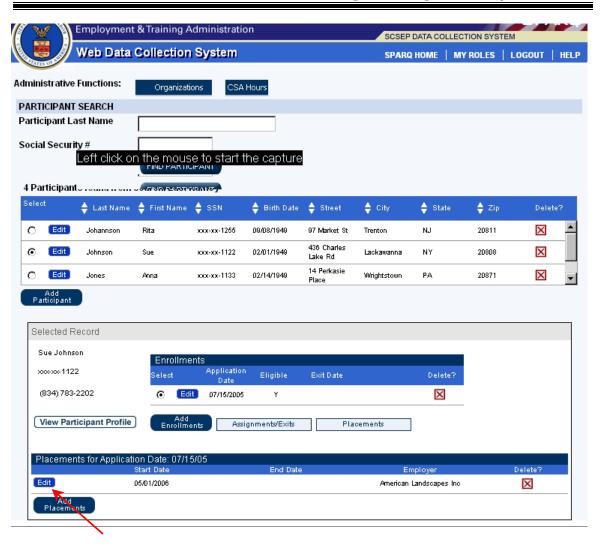
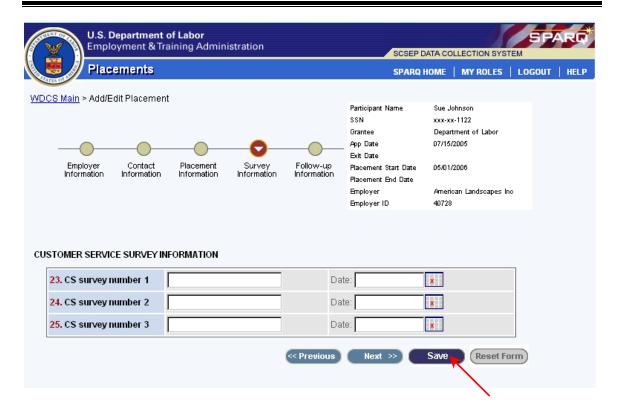When the screen refreshes and the Selected Record Box appears:

(1) Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

(2) Click on the **PLACEMENTS** button.
A new Placements Box will appear on the **WDCS Main Screen** listing the existing assignments (if any) associated with the selected enrollment:

Click on **EDIT** for the specific placement record to be edited. When the **Placement Information Screen** opens, navigate to the **Survey Information Screen**.
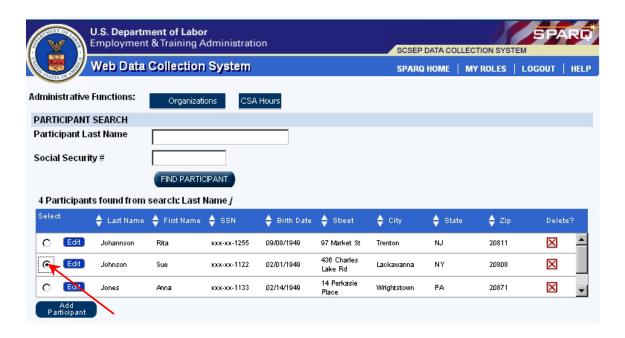
Update the survey data as needed, then click on **SAVE** to update the database.

K. RE-CERTIFICATION

To re-certify an existing participant in SPARQ, the user must first locate the participant's record using the ***Participant Search*** function on the **WDCS Main Screen.** The user selects the participant record to work with from the list of participants that is displayed:

When the screen refreshes, the Selected Record Box appears:

Choose the enrollment that the new data is to be associated with. Note that if there is only one enrollment for the participant, it is automatically selected.

When the **Participant Information Screen** opens, navigate   to the **Recertification Screen**:

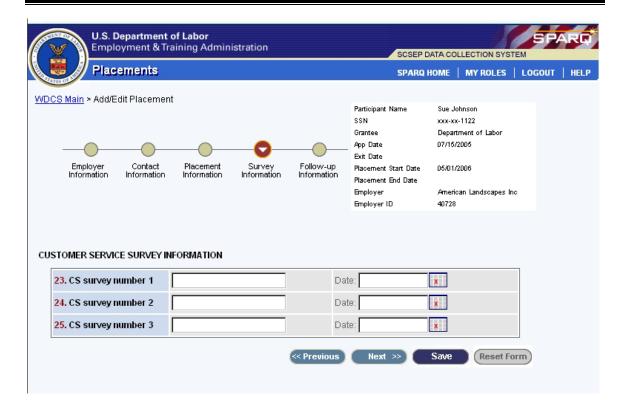Enter the appropriate re-certification data into the blank cells and click on **SAVE** to update the database.

L. VIEWING THE PARTICIPANT PROFILE

The *View Participant Profile* function provides the user with a summary of all records that have been created for a selected participant. It is a convenient way to verify that the correct types of records have been created for the participant and that they are correctly linked together – i.e., when multiple enrollments exist, all assignments and placements are associated with the correct enrollment.

To view a participant profile, the user must first locate the appropriate participant using the *Participant Search* function on the **WDCS Main Screen.** The user selects the desired participant from the list of participants that is displayed:

When the screen refreshes, the Selected Record Box appears:

At this point, simply click on the **VIEW PARTICIPANT PROFILE** button and the participant profile will be displayed:

The selected participant is identified on the left side of the screen. Note that this is the only location in SPARQ that displays a participant's full SSN.

The box at the top, the Enrollment box, provides basic information about each enrollment that has been created for the selected participant. If there is more than one enrollment record, the first in the list is automatically selected when the View Participant Profile Screen first opens.

The user may view a different enrollment by selecting the radio button for the enrollment of interest. The screen will automatically refresh to display the lists of associated assignment and placements records for the new enrollment:

Below the Enrollment box is the Assignments box. It displays basic information about the assignment(s) that are linked to the selected enrollment.

When a specific assignment is selected, the screen refreshes and any training record(s) associated with the assignment will be shown:

At any time, the user may click on **PRINT** to produce a hardcopy of the data displayed on the screen. When done viewing the participant profile, click on **CLOSE** to return to the **WDCS Main Screen**.

VIII. DELETING RECORDS

A. OVERVIEW

Not all users have permission to delete records in SPARQ. For those that do, the **DELETE** button ☒ is displayed on several places on the **WDCS Main Screen:**

Whenever a record is successfully deleted from the database, the **deletion is permanent**. In other words, there is no way to retrieve the deleted data. To minimize deletion errors, SPARQ will always ask the user twice to confirm his intention to delete before actually removing the record from the database. Nevertheless, users should exercise caution whenever utilizing the ***Delete*** function.

** IMPORTANT **
Deletions are permanent. There is no way to automatically restore a deleted SPARQ record.

B. DELETING AN ASSIGNMENT RECORD

When an individual assignment record is deleted from SPARQ, it is important to note that all associated training records will also be deleted.

** IMPORTANT **

Deleting an assignment record in SPARQ will also delete ALL associated training records.

Use the following steps to delete from the database an individual assignment for a participant:

1) First, locate the participant records using the *Participant Search* function on the **WDCS Main Screen**. Select the correct participant record from those that are displayed:

---

2) When the Selected Record box appears:

Choose the appropriate enrollment (1), then click on **ASSIGNMENTS/EXITS** (2). When the Assignments/Exits box opens:

3) Locate the specific assignment to be deleted, then click on **DELETE** A pop-up window asking the user to confirm the deletion will appear:

4) After clicking "OK", the user will be asked to verify the intention to delete:

5) Click **OK** again, and the user will be returned to the **WDCS Main Screen** where a successful deletion message will be displayed:

C. DELETING A PLACEMENT RECORD

The process for deleting an individual placement record for a participant is very similar to the deletion process for individual assignments. Use the following steps to delete an individual placement record from SPARQ:

1) First, locate the participant's record using the *Participant Search* function on the **WDCS Main Screen**. Select the correct participant record from those that are displayed:

2) When the Selected Record box appears:

Choose the appropriate enrollment (1), then click on **PLACEMENTS** (2). When the Placements box opens:

3) Locate the specific placement to be deleted, then click on **DELETE.** A pop-up window asking the user to confirm the deletion will appear:

4) After clicking "OK**"**, the user will be asked to verify the intention to delete:

5) Click "OK" again, and the user will be returned to the **WDCS Main Screen** where a successful deletion message will be displayed:

D. DELETING AN ENROLLMENT RECORD

When deleting an individual enrollment record for a participant, it is important to note that all assignment and placement records associated with that enrollment will also be deleted from SPARQ. For this reason, the user should exercise caution when invoking this function.

> **** IMPORTANT ****
>
> Deleting an enrollment record in SPARQ will also delete ALL associated assignment and placement records.

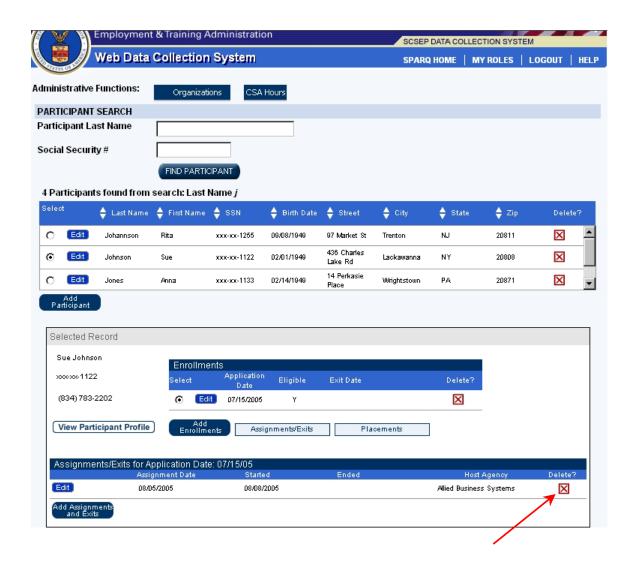Use this process to delete an enrollment:

1) First, locate the participant's record using the ***Participant Search*** function on the **WDCS Main Screen**. Select the correct participant record from those that are displayed:

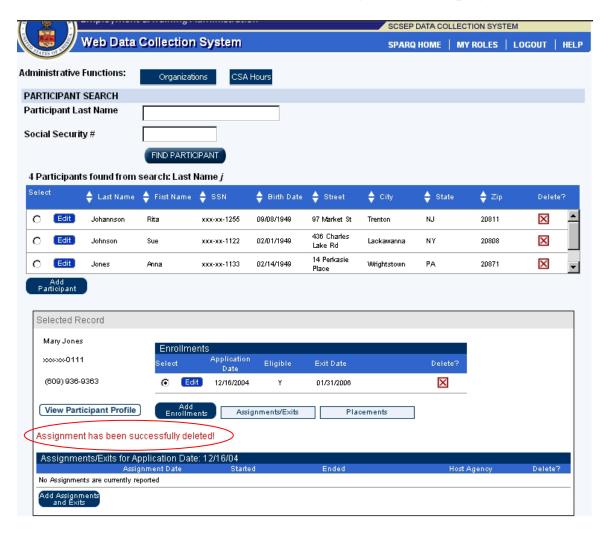2) When the Selected Record box is appears, locate the specific enrollment to be deleted, then click on **DELETE**:

3) A pop-up window asking the user to confirm the deletion will appear:

4) After clicking "OK", the user will be asked to verify the intention to delete:

5) Click "OK" again, and the user will be returned to the **WDCS Main Screen** where a successful deletion message will be displayed:

E. DELETING A PARTICIPANT RECORD

When deleting a participant record in SPARQ, *all other records* – enrollments, assignments, training records and placements – *will also be deleted from the database*.   In other words, all traces of the selected participant are removed from the database and cannot be reinstated.   The only way to re-create the deleted participant's data is to re-enter them.   It is very important that the user exercise extreme caution when utilizing the *Delete Participant* function.

** IMPORTANT **
Deleting a participant record in SPARQ will also delete ALL associated enrollments, assignment and placement records.

To delete a participant and all its records from SPARQ:

1) Locate the participant's record using the *Participant Search* function on the **WDCS Main Screen**, then click on **DELETE**:

2) A pop-up window asking the user to confirm the deletion will appear:

3) After clicking "OK", the user will be asked to verify the intention to delete:
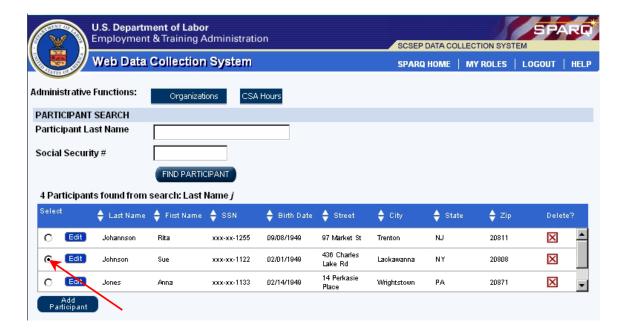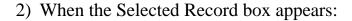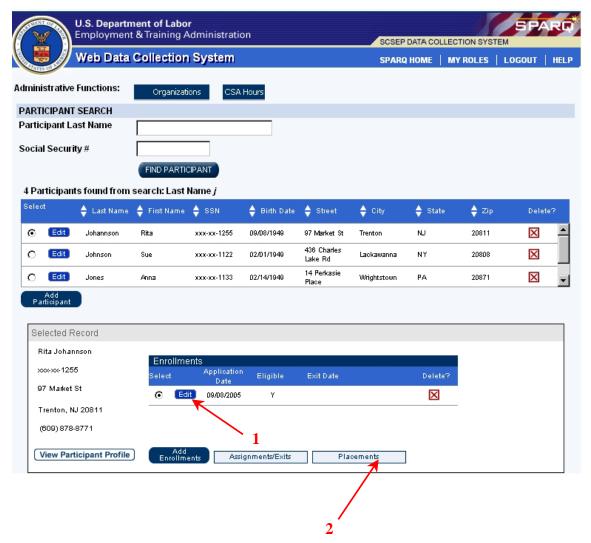
4) Click "OK" again. If the deleted participant was one of several records listed on the **WDCS Main Screen** before the *Delete* function was invoked, a successful deletion message will be displayed on the **WDCS Main Screen**:

Note: If the deleted participant was the only one listed on the **WDCS Main Screen** prior to the *Delete* function being invoked, the user will be returned to a blank **WDCS Main Screen**.

F. DELETING ORGANIZATION AND ORGANIZATION CONTACT RECORDS

Both organization and organization contact records in SPARQ can be deleted *only if* they are not associated with any assignment, placement or training records in the database. Attempting to delete either of these types of records when they have other records linked to them will result in the following error messages:

For organizations: "SCSEP Type could not be de-selected because it is associated with an active assignment or placement"

For organization contacts: "The contact cannot be deleted because it is associated to assignments or placements"

In these cases, in order to delete the organization or organization contact, the user must do one of the following: 1) delete the assignment, placement and/or training record(s) that utilize(s) the organization or organization contact record, or 2) edit the assignment, placement and/or training record(s) to link to a different organization/organization contact.

To delete an organization record, the user should follow these steps:

1) Click on the *Organization* function in the Administrative Functions section of the **WDCS Main Screen**

2) Use the ***Organization Search*** function to locate the record to be deleted:
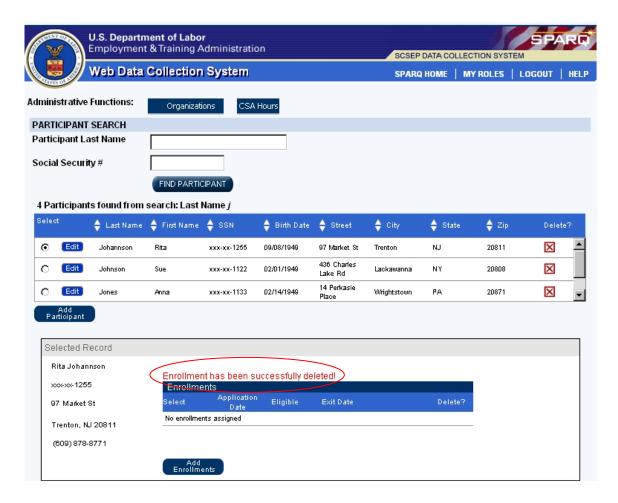

3) Click **DELETE** for the appropriate record and a pop-up window asking the user to confirm the deletion will appear:

4) After clicking "OK", the user will be asked to verify the intention to delete:

5) Click "OK" again, and the user will be returned to the **Organization Screen**.

Similarly, to delete an organization contact, the user should follow these steps:

1) Click on the *Organization* function in the Administrative Functions section of the **WDCS Main Screen.**

2) When the **Organization Screen** opens, click on the **Organization Contact** tab:

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3) Use the **Organization Contact Search** function to locate the record to be deleted:
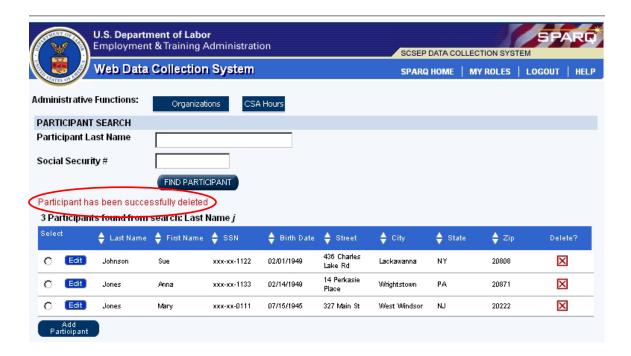

4) Click **DELETE** for the appropriate record and a pop-up window asking the user to confirm the deletion will appear:

5) After clicking "OK", the user will be asked to verify the intention to delete:

6) Click "OK" again, and the user will be returned to the **Organization Contacts Screen**.

IX. WDCS REPORTING FUNCTIONS

A. QUARTERLY PERFORMANCE REPORTS (QPRs)

1. <u>*Overview*</u>

The Quarterly Performance Report (QPR) is produced for all levels of the SCSEP program: nationwide, grantee level, sub-grantee level, and by states for the national grantees. In addition, there is a separate QPR for grantees that administer the Section 502(e) program. It is produced at the grantee and nationwide levels.

There are five QPRs in each program year, one for each calendar quarter and the Final QPR which is the official report of performance for the program year. Each QPR uses three different reporting timeframes -- current quarter, program year-to-date (YTD), and last four quarters (L4Q).

The QPR produced by SPARQ v.2 is similar to earlier versions but includes the implementation of new edits (see the Import/Edit Specifications on the MPR website for a fill list of current QPR edits). It has five sections:

- Section A identifies the SCSEP grantee or sub-grantee for which the report is generated.

- Section B displays customer flow and placement information.

- Section C summarizes community service activity.

- Section D reports participant demographics.

- Section E displays the six SCSEP performance measures and the three additional Common Measures that are required for reporting purposes. For each SCSEP performance measure, both the goal for the program year and the performance for the reporting period are given.

See Appendix B for a sample QPR.

2. *Generation of QPRs*

As per SCSEP program requirements, QPRs are due 30 days after the end of each calendar quarter. Since WDCS users no longer need to create files for submission (their data are now entered directly into the national database), DAS will generate the QPRs from SPARQ on the date the reports are due. QPRs will be frozen as of this date – i.e., no further changes can be made to the reports.

Grantees and sub-grantees may produce a QPR at any time to assist them in the management of their programs. The report, along with a Data Quality Report, will be generated by SPARQ overnight. Because grantees have continuous access to sub-grantee data and complete reporting functionality in SPARQ 2, it is no longer necessary for them to request management reports from their sub-grantees for monitoring purposes.

B. DATA QUALITY REPORTS (DQRs)

Whenever grantees or sub-grantees produce a QPR, the data are reviewed for errors and a Data Quality Report (DQR) is also generated. The DQR lists all errors in the grantee's data as detected by the QPR edits checks. Grantees /Sub-grantees should review the DQR to learn about their data problems so that they can correct the errors prior to quarterly report due dates.

The DQR identifies four types of data errors:

EDIT TYPE	DESCRIPTION
REJECT	Reject edits identify data errors that impact one or more of the performance measures in the QPR. If the edit requirement is not met, the record will be excluded from *all* QPR calculations until it is corrected. **For WDCS Users:** 1) All reject errors will appear on the Data Quality Report whenever a QPR is requested. 2) In addition, a subset or possible reject errors will appear on the screen when the user accesses records in WDCS **For Non-WDCS Users:** 1) All reject errors will appear on the Data Quality Report whenever a QPR is produced. 2) In addition, a subset of possible reject errors will be identified at the time data is submitted to SPARQ.

WARNING LEVEL 1	Level 1 Warning edits identify data errors that impact program eligibility or one or more of the performance measures in the QPR. If the edit requirement is not met, SPARQ will assign a default value to the data element in error and use that default value to calculate the QPR measures dependent upon those fields. **For WDCS Users:** Level 1 Warnings will appear in the Data Quality Report and on the Enrollment-level DQP. **For Non-WDCS Users:** Level 1 Warnings will appear only in the Data Quality Report.
WARNING LEVEL 2	Level 2 Warning edits identify data errors that impacts one or more of the *non*-performance measures in the QPR is a program requirement. If the edit requirement is not met, the data is ignored in the calculation of the QPR. **For WDCS Users:** Level 2 Warnings will appear in the Data Quality Report and in the Enrollment-level DQP. **For Non-WDCS Users:** Level 2 Warnings will appear only in the Data Quality Report.
WARNING LEVEL 3	Level 3 Warning edits identify data errors that have no impact on the QPR but involve a mandatory field. **For WDCS Users:** Level 3 Warnings will appear in the Data Quality Report and in the Enrollment-level DQP. **For Non-WDCS Users:** Level 3 Warnings will appear only in the Data Quality Report.

Users will need to use the edit functionality in SPARQ to correct data that are in error.

C. ENROLLMENT-LEVEL DATA QUALITY PROBLEMS (EDQPs)

The Enrollment-level Data Quality Problems (EDQP) function is a new feature in SPARQ. It can be used to help users identify data problems while working in WDCS before leaving a participant's record.

SPARQ will apply the full set of QPR edits to the data that has been entered for the selected participant whenever the **REFRESH EDQP** button is clicked. A list of all detected errors is produced and can be viewed at the enrollment level.   Using the **VIEW EDQP** button located to the right of an enrollment, the user can review a list of the data errors associated with that enrollment:

When one or more EDQPs are reviewed and the errors corrected, it is recommended that the user verify that the errors have been properly handled by clicking on the **REFRESH EDQP** button. This will generate an up-to-date version of the EDQPs.

A sample EDQP listing is shown here for reference:

Some important things to note about the EDQP listing:

- Each EDQP listing includes the date and time the EDQP was generated.

- Errors are sorted in order of importance or priority for correction.

- If there are errors at the participant level, these errors are repeated in each of the EDQP listing.

D. STANDARD MANAGEMENT REPORTS

SPARQ will provide all grantees and sub-grantees with a set of *standard management report*s to assist them in the day-to-day management of their programs. The six standard reports available in prior versions of the DCS as well as nine new reports are planned for SPARQ v2.

Reports available in DCS

- Active Participant Status Report
- Participant Exit Report
- Participant Follow-up Report
- Overdue Follow-up Report
- Waiting List Report
- Pending Applicant List

These reports will display the same information as in prior versions of DCS; however, the format of some reports has changed. In addition, several reports have been made more robust with the addition of new data.

New Management Reports

- Ineligible Applicants
- Eligible Applicants Not Assigned or on Waiting List
- Participants Who Have Started Employment but Not Reached 30 Days
- Placed Participants Who Have Not Reached Retention
- Pending Follow-ups by Month
- Host Agencies
- Host Agencies With Active Participants
- Unsubsidized Employers
- Unsubsidized Employers With Active Participants

The standard management reports will be released to SPARQ v2 users as they become available.

E. AD HOC REPORTING

SPARQ v2.X will include ad hoc reporting functionality for grantees and sub-grantees to create customized views of their data. Several subsets of the SPARQ data will be made available as BRIO grid views. Similar to Excel spreadsheets, these grid views will provide a flexible way to display data for analysis as well as custom reporting purposes. BRIO will allow the user to sort and filter data and to hide, move or freeze columns. The user may also group data in the grid views by one or more specific fields. Using the filter feature, the user can limit the display of records to a specific data values. All grid views will be printable and exportable to Excel.

More details on the ***Ad hoc Reporting*** function will be provided when it becomes available in SPARQ v2.X.

APPENDIX A

NAVIGATION MAPS

Administrative Functions

WDCS MAIN

Organizations

Organizations (Search)

- **Add Host Agency** — ~ Host Agency Information
- **Add Employer** — ~ Employer Information
- **Add Training Provider** — ~ Training Provider Information
- **Find Organization**
  - **Edit Organization** — ~Edit Organization
    - **Add Contact** — ~ Add Contact Information
    - **Edit Contact** — ~ Edit Contact Information

Organization Contacts

- **Add Contact** — ~ Organization Contact Name
- **Add Supervisor** — ~ Organization Contact Name
- **Add Contact/Supervisor** — ~ Organization Contact Name
- **Find Contact** — ~ Find Contact
  - **Edit Contact** — ~ Edit Contact Information
    - **Link Contact to Organization** — ~ Edit Contact Information

CSA Hours

- **Select Grantee/Subgrantee and Program Year**
  - **Add or Edit CSA Paid Hours and Training Hours** — ~ CSA Hours

PARTICIPANT SEARCH

Participant Last Name: [   ]

Social Security #: [   ]

(FIND PARTICIPANT)

(Add Participant)

Participant Functions

Add Participant

~ Participant Information
~ Eligibility
~ Other Personal Characteristics
~ Eligibility Determination
~ Enrollment Information

WDCS MAIN

Edit Participant

~ (Edit) Participant Information

Add or Edit Enrollments

~ Participant Information
~ Eligibility
~ Other Personal Characteristics
~ Eligibility Determination
~ Enrollment Information
~ Recertification (for Edit only)

Find Participant

View Participant Profile

~ View Participant

Assignments/Exits

Add or Edit Assignments/Exits

~ Host Agency Information
~ Contact Information
~ Assignment Information
~ Training Information
~ Exit

Placements

Add or Edit Placement

~ Employer Information
~ Contact Information
~ Placement Information
~ Survey Information
~ Follow-up Information